

Planned Check-in Phase of Performance Management



The Planned Check-in Phase is a time for Supervisors and Employees to assess progress.



The Fall and Winter months mark the Planned Check-in portion of the Performance Management Process at Auburn University. This is a time for Supervisors and Employees to assess progress. These Check-in's are important because they give the supervisor and the employee a chance to see how well the employee is meeting the duties, goals, and development needs set during the Planning phase and to make adjustments to goals, assess problematic areas, or update the Performance Review Form if there has been a shift in priorities.

The Planned Check-in usually takes place approximately six months after the completion of the Planning phase and is often called a Mid-Year Review, however, Planned Check-in's can be arranged through mutual agreement when feedback is needed or accomplishments are met and not just at the six-month mark. Some departments at Auburn touch base quarterly with their employees.

Best Practices:

The Planned Check-in Phase along with the rest of the Performance Management process is discussed in our online courses, MG500e: Introduction to Performance Management and MG510e: Performance Management Fundamentals for Supervisors.

BEFORE THE MEETING:	
Spend time planning	<ul style="list-style-type: none">Planned Check-in sessions should occur during between October 1 and December 15.Spend ample time to plan before the Planned Check-in meeting occurs.Review each employee's Performance Review Form that was saved from the Planning meeting.Send an Outlook calendar request to each direct report for separate one-on-one meetings and allow for uninterrupted time.
DURING THE MEETING:	
Set the tone	<ul style="list-style-type: none">Set a comfortable and friendly tone.Remind your employee about what was planned in the previous Planning meeting.

<p>Review Expectations:</p>	<ul style="list-style-type: none"> • Review job duties, position goals, and development needs. • Commend successes and performance efforts. Praise your employee when progress has been made toward goals, duties, goals, or development. • Hold the employee accountable. Discuss the reasons why progress may not be occurring. <ul style="list-style-type: none"> • It might be a good idea to re-direct performance efforts if there are duties, goals, or developmental areas that have had no progress. • Adjustments may need to be made so that improvement can happen. • Make adjustments to the form by adding the date and changes to existing duties, goals, or development plans to the Performance Review Form as needed. • It is also okay to add new duties, goals, or development plans to the Performance Review Form.
<p>Consider Development:</p>	<ul style="list-style-type: none"> • Consider development and career potential. • Date and add completed classes to the Performance Review Form. • You can also date and add new recommendations to the Performance Review Form.
<p>Discuss Observed Behaviors:</p>	<p>Job duties and responsibilities are important in establishing performance expectations and reviews. But it's not just about meeting the expectations of a job. It's about how the job is performed. Behaviors matter.</p> <ul style="list-style-type: none"> • Have a focused conversation about the specific behaviors that will assist the employee to achieve the desired outcomes. <ul style="list-style-type: none"> • Utilize the Observed Behaviors website to aid in the conversation. The website can be found by going to aub.ie/observedbehaviors. Here you will find 31 behaviors listed with definitions and varying performance level examples that can be copied and pasted directly into the Performance Review Form.
<p>AFTER THE MEETING AND THROUGHOUT THE YEAR:</p>	
<p>Coaching & Feedback:</p>	<ul style="list-style-type: none"> • Save the Performance Review Form with the updated check-in information and send a copy to the employee. • Don't forget that Coaching and Feedback occurs throughout the year. <ul style="list-style-type: none"> • Effective and timely feedback is a critical component of a successful performance management process. • Frequent feedback provides clarity and eliminates surprises. Employees should not be caught unaware when they sit down for their Planned Check-in in a few months time. Employees need to know where they stand. • Offer clear feedback in a timely manner on how they're doing, what's working, and what's not.

For more information, contact us at autrain@auburn.edu or at aub.ie/performance.



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Auburn University Human Resources | 1550 E. Glenn Ave | Auburn University, AL 36849 | (334) 844-4145