

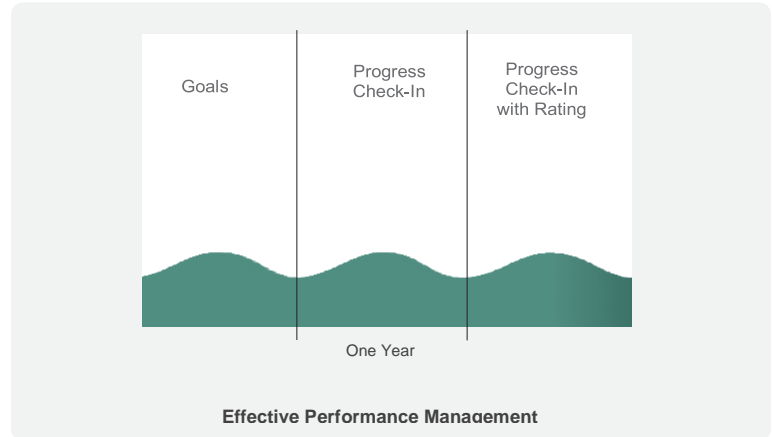
Progress Check-Ins

What are Progress Check-Ins?

Progress Check-Ins are regular discussions that happen three times a year to:

- Discuss what is going well and what could be better,
- Check in on progress toward goals,
- Stay aligned on current projects, and
- Agree on next steps.

Progress Check-Ins promote progress toward goals by providing opportunities for feedback and support.



Effective performance management requires regular check-ins as work progresses.

Having regular meaningful conversations is key to on-the-job learning which is the single most important way people improve and grow at work.

How do I conduct Progress Check-Ins?

Progress Check-In meetings occur during two scheduled time frames per year. Progress Check-Ins can occur at any point during the current performance time frame to allow flexibility around business needs such as the academic calendar, budget cycle or seasonal work. Note that if you meet more often to discuss day-to-day work and development, you can incorporate goal conversations into your existing meetings. Use your judgment regarding what will best support the performance and development of each person you supervise.

DISCUSS ROLES AND RESPONSIBILITIES FOR PROGRESS CHECK-INS

Discuss expectations for what you, the manager, and your direct report are each responsible for. A good time to do this is at the beginning of the performance cycle, once the annual goals are set and revisit as needed. If one or both of you are not taking ownership for your role in Progress Check-Ins, this is an important place to start your next Progress Check-In conversation.

Your role as a manager

- Clarify the purpose and schedule of the Progress Check-Ins
- Define what success looks like
- Clarify how employee's work contributes to the big picture
- Bring goals and expectations for both results and behaviors into regular feedback and coaching conversations

Your direct report's role

- Ask questions
- Be proactive when work seems misaligned with broader goals
- Seek, accept, and act on feedback
- Take ownership of their own career and development - set goals, seek opportunities, ask for guidance when needed

Be clear with the employee about their role in check-ins. If the person is not doing their part, address this directly, otherwise your efforts will be wasted. A common trap for managers is to take on responsibility for the employee's role.

Progress Check-Ins (Cont.)

REVIEW AND COMPLETE ePERFORMANCE MANAGER ASSESSMENT

Start the current Manager Assessment by first reviewing goals or next steps from previous Progress Check-In meeting:

- Are there any updates? Which could include progress since last conversation, changes to resources or timelines that impact the goal, additional information or questions.
- Review current self-review completed by employee.
- Complete Manager Assessment by reviewing the questions provided. What has your employee achieved or completed since the last progress check in? What areas of concern or growth have you noticed? What do you see as next steps for the employee in meeting the goals they are working on?

As a manager, be sure to re-affirm and discuss how individual projects and assignments fit into the bigger picture. When people understand how their efforts contribute to serve a bigger purpose, they will be more motivated and engaged in their work.

If priorities shifted, set new goals* or update existing goals to reflect the change. Discuss the following questions:

- How does this project or assignment fit into the employee's annual goals? If it does not, discuss why it makes sense for this person to take on this project or assignment.
- What does success look like with regard to the goals?
- What behavioral competencies** will be most important for success?



* See the [Goal Setting Tips, S.M.A.R.T goals](#) for steps and best practices on setting up goals.

** Need more information on behavioral competencies? Learn more about the [UM System Success Factors](#) and other competency models to support talent development discussions.

DISCUSS MANAGER ASSESSMENT WITH EMPLOYEE

Discuss and evaluate progress toward goals; Provide feedback about the goals based on your observations, feedback from others, and the updates that the employee has shared.

Provide at least two comments to reinforce and/or redirect the employee progress:

- What did the employee do well to advance goals?
- What are the two things that employee needs to do more or less of to help achieve the goals?

Is your feedback and coaching effective*?

- Consider the person's level of self-awareness and motivation to learn from feedback and coaching. If they are not self-aware or motivated, address this first.
- Consider whether feedback will be effective at this point in time. If yes, give feedback to help the person understand the situation, their behavior, and the impact of their behavior. Be sure to take every opportunity to provide positive feedback and recognize good work, it is a powerful way to reinforce effective behaviors and to motivate higher performance.
- Consider whether new skill training would be helpful.
- Provide opportunity for reflection - what is going well? What can be done better?
- Discuss opportunities for the person to apply and master the skills through the project and assignments they are working on.

*Find additional resources related to Coaching and Feedback on the [UM System E-Performance Progress Check-In Website](#).

Progress Check-Ins (Cont.)

DETERMINE NEXT STEPS

- Determine** What do they need to support them in this work (additional information, resources, skills, training, opportunities to practice, etc.)?
- Discuss** Agree on next steps for the work, for the person's development, and for your future progress check-ins:
- What are the person's next steps and when will these next steps be taken?
 - What are your next steps as their supervisor and when will you take them?
- Consider what makes the most sense for the work, for the individual, and what practices and expectations exist within your college, campus, or unit.
- Document** You can have some ideas for next steps before your meeting, but it is recommended to engage the employee and to update ePerformance accordingly.