



STAFF PERFORMANCE PROGRAM FOR  
NON-REPRESENTED EMPLOYEES AT UC BERKELEY  
Recommended Check-in Conversation Process  
for Managers/Supervisors and Direct Reports

	Manager/Supervisor	Direct Report
Before	<ol style="list-style-type: none"> <li>1. Plan how you will apply <a href="#">coaching skills</a> to the <a href="#">check-in conversation</a>, especially how to help your direct report talk about their performance, to listen-in to an individual's work experience, and to help them be successful. Prepare how you will discuss work that is on track, accomplishments, and opportunities for improvement.</li> <li>2. Review the <a href="#">Achievement Criteria</a> to consider current and future states of work, and what you can do to support your direct report's acquisition of knowledge, skills, and support needed to be successful.</li> </ol>	<ol style="list-style-type: none"> <li>1. Reflect on the current state of work, where it's going, what's needed for success, and the quality of your work experience, including the relationship with your manager. Prepare how you would like to discuss what's on track, major accomplishments, and opportunities you have for improvement.</li> <li>2. Use the <a href="#">check-in questions</a> that map to the <a href="#">Achievement Criteria</a> as a guide for preparing to talk about your work performance (collaboration, goal accomplishment, inclusion &amp; belonging, innovation, and job mastery).</li> </ol>
During	<ol style="list-style-type: none"> <li>1. Use the <a href="#">check-in questions</a> that map to the <a href="#">Achievement Criteria</a> performance indicators to encourage the employee to focus on current progress..</li> <li>2. Use terminology that makes sense in your everyday conversations, rather than a rote reading of the check-in questions. The goal is to have a meaningful conversation, not a formal interview.</li> <li>3. To go deeper into the conversation, use open-ended questions to check for clarity and explore the employee's work experience. Seek to understand through finding agreement and explore discrepancies. Discuss work that is going well and on track, accomplishments, and opportunities for improvement. Use the 4-step <a href="#">coaching model</a> to explore, discover, plan, and act.</li> <li>4. During the conversation, jot down key information to input in the Achieve Together online documentation tool following the check-in.</li> <li>5. Be sure to check-in on <a href="#">goal accomplishment expectations</a> for the next four months. Ensure alignment with team, unit, and campus strategies.</li> </ol>	<ol style="list-style-type: none"> <li>1. Use the <a href="#">check-in questions</a> that map to the <a href="#">Achievement Criteria</a> performance indicators to discuss your current work progress and experience, in addition to future performance planning. These questions are pathways to go deeper on topics, issues, and themes, and not to limit the extent of the conversation.</li> <li>2. Be open to feedback, partner in problem-solving, and take ownership over your achievements and areas for improvement.</li> <li>3. Spend time discussing additional knowledge, skills, and support needed for success at UC Berkeley.</li> <li>4. During the conversation, jot down key information to input in the Achieve Together online documentation tool following the check-in.</li> <li>5. Check-in on <a href="#">goal accomplishment expectations</a> for the next four months.</li> </ol>
After	<ol style="list-style-type: none"> <li>1. Start and share an Achieve Together documentation form for the check-in period on your performance <a href="#">dashboard</a>. Once opened, the form will be automatically available in your employee's inbox.</li> <li>2. Review key highlights of the conversation from your perspective and document in the Supervisor Comments section of the form, noting accomplishments, work that is going well and on track, and opportunities for improvement.</li> <li>3. Document any updates to goals that were discussed during the check-in conversation. These updates are to reflect the next four months of goal completion expectations.</li> <li>4. Save and finalize your notes and comments to complete your part of the form.</li> <li>5. Ensure you have 1on1s scheduled between check-in conversations to exchange feedback, and to connect on work expectations, goals, priorities, what's going well, areas for improvement, and needed support for success.</li> </ol>	<ol style="list-style-type: none"> <li>1. After the supervisor starts and shares the check-in form, it will arrive in your inbox ready for edits. You can access the form on your Achieve Together <a href="#">Online Dashboard</a> as well.</li> <li>2. Review key highlights of the conversation from your perspective and document these in the Employee Comments section of the form.</li> <li>3. Review goal updates made by your supervisor based on what was discussed in the check-in conversation. Connect with your manager if there are questions or concerns.</li> <li>4. Save and finalize your notes and comments (signifying you reviewed the content in full) to complete your part of the form.</li> <li>5. Ensure you have 1on1s scheduled between check-in conversations to exchange feedback, and to connect on work expectations, goals, priorities, what's going well, areas for improvement, and support you need for success.</li> </ol>