



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

Recommended Check-in Process	Manager/Supervisor	Direct Report
BEFORE	<ol style="list-style-type: none"> <li>1. Plan how you will apply coaching skills to check-in meeting, 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.</li> <li>2. Review the Achievement Criteria 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 to be successful.</li> </ol>	<ol style="list-style-type: none"> <li>1. Reflect on 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.</li> <li>2. Use the Achievement Criteria check-in questions as a guide for preparing to talk about your work performance (job mastery, goal accomplishment, collaboration, innovation, and inclusion).</li> </ol>
DURING	<ol style="list-style-type: none"> <li>1. Use the Achievement Criteria check-in questions to encourage the employee to focus on current progress and experience, in addition to future performance planning.</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 in 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.</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 goal accomplishment expectations 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 Achievement Criteria check-in questions 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 goal accomplishment expectations for the next four months.</li> </ol>
AFTER	<ol style="list-style-type: none"> <li>1. Open an Achieve Together documentation form for the check-in period on your performance dashboard. Once open, it is automatically available for staff.</li> <li>2. Review key highlights of the conversation from your perspective and document in the Supervisor Comments section of the form.</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 the check-in form to complete your part of the check-in period.</li> <li>5. Ensure you have 1on1s schedule between check-in conversations to connect on work expectations, goals, priorities, and necessary support for success.</li> </ol>	<ol style="list-style-type: none"> <li>1. Open and review the form that will appear in your inbox from your supervisor.</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 the form (signifying you reviewed the content in full) to complete the check-in period.</li> <li>5. Ensure you have 1on1s schedule between check-in conversations to connect on work expectations, goals, priorities, and necessary support for success.</li> </ol>