Rethinking our approach to staff evaluations
Today's Meeting

- Big Picture - WHY
- Timeline - WHEN
- Demonstrate - HOW
- Resources Available
- Questions
A Historical Look

- UF launched the Performance Management Initiative (PMI) in 2006
  - TEAMS and USPS employees
  - Annual
  - Self-appraisal (strongly encouraged)
  - Categories
  - Ratings

- This served the Libraries well. We took it seriously, had a number of trainings annually, and the second level supervisor was engaged to add consistency.
Thinking Changes

- Over 13 years work has changed
- Thinking has changed regarding performance evaluations
- The UF PMI is no longer the best design for preeminence
- Need something that is better at driving employee engagement and high performance
- Need something more agile, real-time, frequent and future oriented
- Need something focused on improvement and growth – developing people!
Why Change?

- More emphasis on people development
- Need for greater agility – do any of us have static jobs?
- Teamwork has become more central to what we do

Need to more closely follow the cycle of work
Making the ClimateQUAL Connection

► Four areas where improvement is needed
  ► Support for teamwork (Structural Facilitation of Teamwork)
  ► Encouragement for the sharing of opinions (Climate for Psychological Safety)
  ► Capacity to contribute to the team (Psychological Empowerment in the Workplace)
  ► Disagreement within team on methods or procedures (Work Unit Conflict-Task)

All have to do with communication/information/sharing
It’s About Regular Feedback

With UF Engaged:

- More frequent, shorter conversations about the work
  - What’s going well?
  - What needs to improve?
  - Future focus: What’s next?
- Many supervisors are having these conversations already—so for many of us, this will just be a useful reminder to be more intentional
- For others of us this will provide a structured format and reminder
Time Line

- UF Engaged Quarterly Check-in System opened in myUFL—October 1st

- Supervisors & Staff are starting to receive email notifications

- First round of Quarterly Check-ins due, starting November 1st
Performance Notes

- Tool to keep personal notes about performance and track specific events
- Used as a resource when preparing for Quarterly Check-ins
- Content of Performance Notes and any attachments are only accessible to the user who entered the information
- Performance Notes are not public records subject to the provisions of Florida’s Sunshine Law, if the notes have not been shared with others.
Let’s Take a Look at the System
From: UF ENGAGED  
Sent: October 15, 2019  
To: gatora@ufl.edu  
Subject: UF Engaged: It’s time for your Quarterly Self-Assessment

Hello Albert,

It's almost time for your Quarterly Check-in! A Self-Assessment has been created for you for the period of 08/15/2019-11/14/2019. Your leader will be conducting a Quarterly Check-in meeting with you before 11/15/2019. You have the option of completing the Self-Assessment through myUFL at My Self Service > UF Engaged > My Performance Documents > Current Documents.

Keep in mind that the optional Self-Assessment is your opportunity to provide information for your leader’s consideration in preparation for your Quarterly Check-in.

Once your leader finalizes the Quarterly Check-in, you will no longer be able to begin, edit, or submit the Self-Assessment for this quarter. To ensure you have the opportunity to complete this quarter’s Self-Assessment, be sure to discuss a completion date with your leader.

For a tutorial on how to complete the Quarterly Check-In, please visit the UF Engaged HR Toolkit. If you have further questions about UF Engaged, contact your department/college Human Resources representative. For more information about UF Engaged and resources available to you, please visit the UF ENGAGED website.
Employee View

Navigation
My Self Service \(\rightarrow\) UF Engaged \(\rightarrow\) My Performance Documents

Options
- **Current Documents:** In-Progress Check-ins
- **Historical Documents:** Completed or Cancelled Check-ins

UF Engaged HR Toolkit – Simulation and PDF on Performance Notes and Check-ins
## Opportunities to Reflect

<table>
<thead>
<tr>
<th>Accomplishments</th>
<th>Improvements</th>
<th>Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document progress, strengths, events &amp; accomplishments</td>
<td>Identify areas where good performance can be elevated or where improvement is needed.</td>
<td>Identify goals, needed career/skill development and growth opportunities</td>
</tr>
</tbody>
</table>
Hello,

A Quarterly Check-in is now available for you to complete for Albert Gator (UFID: 12345678) for the period of 08/15/2019 – 11/14/2019. Please schedule a Quarterly Check-in meeting with Albert before 11-15-2019, and begin drafting the Quarterly Check-in through myUFL at [Human Resources > Manager Self-Service > UF Engaged > Performance Documents > Current Documents].

Albert will also receive an email notification today with a prompt to complete the optional Self-Assessment, which will be visible to you within the Quarterly Check-in through the UF Engaged module of myUFL.

Once you finalize the Quarterly Check-in, Albert will no longer be able to begin, edit or submit the Self-Assessment for this quarter. To ensure Albert has the opportunity to complete the Self-Assessment, please be sure to discuss with him when you plan to finalize and complete the Quarterly Check-in.

You are encouraged to review the Self-Assessment as you draft the Quarterly Check-in.

For a tutorial on how to complete the Quarterly Check-in, please visit the [UF Engaged UF Toolkit]. If you have further questions about UF Engaged, contact your department/college Human Resources representative. For more information about UF Engaged and resources available to you, please visit the [UF ENGAGED] website.
**Supervisor View**

**Navigation**
Human Resources ➔ Manager Self Service ➔ UF Engaged ➔ Performance Documents

**Options**
- **Current Documents:** In-Progress Check-ins
- **Historical Documents:** Completed or Cancelled Check-ins
- **View-Only Documents:** Check-ins for Direct and Indirect Reports

**UF Engaged HR Toolkit** – Simulation and PDF on Performance Notes and Check-ins
Opportunities to Provide Feedback

**Accomplishments**
- Document progress, strengths, events & accomplishments

**Improvements**
- Identify areas where good performance can be elevated or where improvement is needed.

**Goals**
- Identify goals, needed career/skill development and growth opportunities
Second level supervisor review still required in the Libraries PRIOR to submitting

You can print for review
Other Evaluations

- Probationary
- Probationary Extension
- Special Performance Improvement Plan (PIP)

As before – contact Libraries HR Office if there are issues
We Are Here to Help

- **UF Engaged Website** – offers a variety of guides, simulations, and available trainings to aide in the success of supervisors and staff.

- Tina Litchfield  ext: 3-2602  tlitchfield@uflib.ufl.edu
- Bonnie Smith   ext: 3-2603  bonniesmith@ufl.edu
QUESTIONS?