FAQs
Check-in Conversations Process

Q: Will this satisfy the state's performance planning and evaluation (two-part) requirement for classified employees?
A: Yes and No! For classified employees only, the supervisor will have to state whether an employee is a 'below contributor,' 'contributor,' or 'extra contributor;' of course this should be based upon the feedback from their Check-in Conversations. This translation will not need to be done for University Employees.

Q: Is this supposed to replace our current performance evaluations process.
A: Yes

Q: If the cycle is May 2019 to September 2020, when is this process actually going to take place given that we are in mid-October now.
A: Immediately. The goal is for everyone to have a documented conversation with their supervisor/staff this fall, or as soon as practical, using the interim framework. Ideally, the conversations center upon work that has occurred since June of this year given that supervisors were asked in May/June to hold a feedback conversation with their staff about the past year. Nonetheless, the conversation this fall will close-out the performance cycle discussed above.

Q: Doesn't this remind us of the Development Plan that we already have?
A: It is similar, there is a focus on development approach in the new framework. Growing in one's current position, or learning new skills to grow into another are potential discussion items.

Q: Will all check-ins need to be done around the same time frame (ex: Jan and July) or can they be spread-out and align with hire date? A supervisor with staff may benefit from a stagger check-in schedule as opposed to getting them all done at once.
A: A present we are only working on the interim solution for the May 2019-Fall 2020 time period. But, if the pilot succeeds, staggering the discussion periods will be a basic part of the framework. Staggering will allow one's attention focused on one person at a time, not a list that just needs to get done in a specific window of time.

Q: If you formal probationary reviews with discussion with a new staff member were recently conducted... does this fulfill the obligation?
A: Yes, if the supervisor and staff member met, formally discussed performance, and documented this conversation within the last four months, another discussion is not needed at this time.

Q: What is the role of the supervisor's supervisor?
A: In the new framework, the supervisor's supervisor only has to review and sign the form if there are "performance deficiencies that may warrant a formal 'performance improvement plan' if uncorrected."

Q: As a supervisor of supervisors, I'd like to see these documents. Can someone in my position get access still?
A. Easy; and yes. It is always the supervisor's prerogative to have access to such information.

Q: Will the training we receive address how this will be implemented?
A: Yes.

Q: There may be no funds this round, but if there were, without metrics, how will finance know how to distribute? There has to be a way to prove no partiality in raise amounts provided unless everyone receives the same.

A: The reasons to hold check-in conversations are to support a) ongoing performance, b) the professional and the person performing the work, and c) their growth and development. A separate process for determining raise amounts, merit, and bonuses will be determined in the future. However, we suspect that if Check-in Conversations are held regularly, the documented results will be invaluable for providing justification for such decisions.

Q: I heard that employees will be required to prepare for each Check-In Conversation. Is this true?
A: Yes; in order to have a robust conversation about one's own work, some preparation is required. Staff members can use the questions listed on the form to prompt them to reflect on their recent work. Unit-specific questions can be provided by the supervisor, or the employee may have their own thoughts. The process expects employees to have thoughts about their own work and to engage in a two-way discussion with their supervisor about it.

Q: Must the employee complete the form like the old self-evaluation?
A: Preparation for a Check-in Conversation is required, however this preparation does not have to be written down or documented. Not all employees sit at desks and have access to computing. However, all employees must spend sometime reflecting upon how their work has been going and think about ways to improve it. This reflection is necessary to have a good conversation with the supervisor. Writing notes down on the Check-In Conversations form or having other documentations is helpful, but it is not required.

Q: Is this going to be in Cornerstone as formal repository of information?
A: Yes! This will happen eventually. We are working on ways to automate this interim process. However, the most important part of this new process is to hold an actual, two-way conversation with staff about their contributions. Automation is in the works and the details of when the system is ready to receive this information will be published. In the short term, conversations can and should be occurring.

Q: While there's nothing in writing, I meet with each of my direct reports monthly to check in on their projects, progress, well-being, etc.
A: Great, you are more than half way there. Going forward, you just need to keep a record of those conversations, ensure the employee has a chance to have 'two-way dialogue' with you about their performance, and ensure that you are focused on the past, present, and future, and you are all set.

Q: I have regular meetings with my staff, is that enough?
A: Regular meetings with staff and a check-in conversation are the difference between the forest and the trees. Regular meetings are about individual tasks, projects, assignments and such and are the 'trees.' Check-in conversations are about the forest—how are we working, what is going well with the way we work, what should change, be improved, and how is one feeling about their work and co-workers. And importantly, it is also an opportunity for the employee to ask questions and be engaged in the conversation about their work.

Q: I had the conversations with the staff as they were encouraged for us to have this summer. I am confused now because we have talked about training as we moved to the new system; now we are talking about no-stress conversation. Can you please clarify what they training would involve?
A: The training will involve the art of having a performance discussion that is focused on feedback, assessment, and development instead of setting a rating. If you have already held a discussion with your employee about how they were doing early this summer, you are right on track. Now you would just have to have another documented conversation about their contributions since the last conversation.

Q: Is there a timeline for when the long-term structure will be rolled out? It would be helpful if we could know from the start of the period what the future system will look like. Are there ways to provide feedback for a permanent system?
A: Ideally, we will start immediately on the new system as we finish recording the results of our efforts for the May 2019-Fall 2020 time period. It is likely that our future process will resemble the interim process—but hopefully improved from lessons learned from the interim implementation we are doing right now.

Q: Will a 360 degree process be included in this process?
A: Not at this time. For the interim solution will just focus on conversations about the staff members contributions, professional development, and wellbeing. For the permanent solution, we will consider incorporating a 360 degree process.

Q: What happens if an employee does not perform well despite multiple conversations or corrections?
A: If an employee's performance is not on par and it warrants a performance improvement plan, the Check-in Conversations process should trigger the actions to <u>further</u> document the corrective actions required, the time-frame in which actions must be taken, and the results. Contact Deb Jarvis in Human Resources for assistance.

Q: What if an employee's performance is so outstanding that they should be recognized.
A: If an employee's performance is excellent and beyond the excellence that is expected of W&M employees, the supervisor should document this performance and send this recognition through the normal administrative channels. Sample submissions can be obtained through AskHR@wm.edu. A formal recognition process is being developed.

Q: If the Check-in Conversations process will not have ratings, how will we determine who gets a cost of living or merit increase when the budget allows?
A: Supervisors and department heads will use information and documentation from Check-in Conversations, along with all other available management information to make recommendations for salary increases for their staff. The administrative process by which recommendations will submitted will be published each year when such determinations are to be made.