



**FACES & VOICES  
OF RECOVERY**

## **Staff Quarterly Check-In Guide**

This guide is designed to provide staff details about Faces & Voices Performance feedback process. By following this Quarterly Check-In Guide, employees and managers can engage in meaningful conversations that promote growth, alignment, and collaboration within the organization. Regular check-ins contribute to employee development, job satisfaction, and overall organizational success.

### **What is a Quarterly Self-Assessment Check-in?**

Through Quarterly Check-ins, staff reflect on their progress toward goals, successes, and improvements in their role and company culture. These structured discussions between staff and their manager are designed to support employee success through reflection, planning, problem solving, and honest and constructive feedback.

Quarterly Check-ins focus on the staff's successes, areas in which improvement can be achieved, job role goals, and professional development opportunities.

### **What to Include in Your Self-Assessment Quarterly Check-in**

Both the staff's self-assessment and the manager's assessment cover the following three topics (*Note: No ratings are assigned; all sections should be in narrative format*):

#### **1. General Assessment – How Are things going?**

- Take some time to reflect on your performance, achievements, and areas for improvement over the last quarter.
- Consider any challenges you've encountered and how you've overcome them.
- Celebrate your success! Record your wins and the outcomes you have achieved.

#### **2. Goals & Measurable Outcomes – What is your vision for your role & career?**

- *Goal Review and Adjustment*
  - Review the goals set in the previous check-in and assess your progress.
  - Discuss any adjustments needed to ensure your goals remain relevant and achievable.

ADVOCATE. ACT. ADVANCE.



To create performance-based goals, use the SMARTIE goal criteria:

Note: [Use this worksheet to build SMARTIE goals.](#)

<b>Specific</b>	Make them as specific as possible.
<b>Measurable</b>	What will success look like?
<b>Achievable</b>	Give them room to stretch and grow.
<b>Relevant</b>	Make sure they focus on outcomes that matter most.
<b>Time</b>	When will progress be discussed?
<b>Inclusive</b>	Who needs to be at the table?
<b>Equitable</b>	Does it address systemic injustice, inequity, oppression, and accessibility?

Setting goals and objectives provides clarity on what is expected of us. It's not just about meeting expectations, but also about personal growth and contributing to the organization's mission and strategic vision. These goals should push us to excel while also being directly relevant to our roles and responsibilities.

### 3. Professional Development - Career/skill development and growth opportunities.

Share your professional development goals and any training or learning opportunities you're interested in. Discuss how these goals align with your career aspirations and how you can work towards them.

- Discuss potential training, conferences, and development resources.
- Set reasonable goals to work toward during the next quarter.
- Identify professional development opportunities
- Create growth opportunities to focus on during the next quarter such as:
  - Take part in meetings on specific topics (i.e advocacy, fund development, etc.)
  - Performing duties that expand knowledge of and role in the department.
  - Coaching or mentoring supports.

### 4. Company Culture – Discuss the Overall Personality of the Company

- Provide feedback on what aspects of the company culture are working well and where improvements could be made.
- Share any feedback or suggestions for your manager or the organization.
- Explore opportunities to reinforce company values and integrate them into daily operations and decision-making processes.
- Evaluate the level of employee engagement and morale within the team or department.

ADVOCATE. ACT. ADVANCE.



- Brainstorm ideas to boost engagement and morale, fostering a positive work environment.
- Explore ways to improve communication and collaboration among teams or departments.

## **Tips on Talking about your Self-Assessment During the Manager/Check-in**

### *Review Objectives and Expectations*

- Familiarize yourself with the objectives and expectations outlined for the check-in.
- Prepare to discuss your progress towards your goals and any updates on ongoing projects.

## **During the Manager and Employee Check-in:**

### *Be Engaged*

- Take an active role in the conversation. This is your opportunity to share your thoughts, achievements, and concerns.
- Ask questions and seek clarification on anything you're unsure about.
- Make sure to take notes during the meeting to keep track of important discussions and decisions. This will help you stay organized and focused on your goals until the next check-in.

### *Utilize Open Discussion and Planning*

- Use this time to discuss any other topics or concerns you have. *Discuss Achievements and Challenges.* Highlight your accomplishments within this past quarter. Be honest about any difficulties you've faced and discuss potential solutions or support needed.
- Collaborate with your manager to plan for the upcoming quarter, prioritizing tasks and setting clear objectives.

### *At the End of the Meeting*

- Summarize the key points discussed during the meeting.
- Confirm any action items or next steps

### *Following the Meeting*

- Once your manager has completed their part of the check-in:
  - You will have the opportunity to add comments of feedback.
  - Check-in must be reviewed and acknowledged within 3 days.

ADVOCATE. ACT. ADVANCE.