**CHECK-IN PROCESS**



Kent District Library has adopted the practice of frequent, less formal check-ins in lieu of annual performance reviews. Through ongoing communications we are seeking to establish relationships with our staff that allow us to provide in-the-moment feedback, establish shorter-term objectives, and remain in tune with strategic goals and employee objectives. The use of less formal and frequent interactions provides the opportunity to capture essential elements of each employee’s development process without making the process an event in and of itself. The check-in process is designed to encourage a culture of mentoring, support, recognition, and communication in the spirit of the *KDL Way*.

This document contains an overview of the check-in process and related expectations, where you can find (and add to) employee performance logs, and some frequently asked questions related to check-ins. Should you have any questions, please contact the Human Resources team at extension 2226 or via email at [HumanResourcesEmail@kdl.org](mailto:HumanResourcesEmail@kdl.org).

**Check-in process Overview/Expectations**

* Mentoring, supporting, communication, and recognition provide the foundation of check-ins. Our goals are to catch people doing things right, celebrate the team’s wins, and promote growth. If issues develop, please engage in informal coaching and documentation, request support from Human Resources for coaching guidance or assistance in developing a performance improvement plan.
* Conversations may be spontaneous or scheduled, depending upon which format works best for you and your team members.
* A minimum of one check-in is required for each employee each quarter. Four is the minimum number of Performance Log entries for each employee annually. There may be additional entries as opportunities present themselves.
* Entries for each conversation must be logged in the HRIS in the in the section titled *Performance Feedback*.
* Check-in log entries should be short summations of the context of your conversation. They do not need to be lengthy or contain intricate details of your interactions; rather, they should highlight key points.
* Documentation provides insight regarding employee development, team wins and opportunities, and the evolution of issues. It is crucial that notes are retained to support initiatives and actions taken to ensure continued development and consistent accountability practices.

**Check-In Entries**

1. Log in to [Paycor](https://secure.paycor.com/)
2. From the Employees menu at the top, choose Manage Employees
3. Select appropriate employee
4. From the Company menu on the left, choose Performance Feedback
5. Click Log Feedback (Please do not use the Request Feedback button)
6. In the topic field, indicate current year and quarter, for example “1st Quarter 2020 Check-in” and record your check-in recap in the feedback section.
7. Click Save

**Tips**

* Open-ended questions are meant to encourage employee engagement/insight and avoid simple answers. Here are some examples you may utilize to get employees talking:
  + What are you working on right now? What are your immediate priorities?
  + Is there anything standing in your way? Do you have what you need to move forward?
  + What do you need from me? How can I help you?
  + What is going well?
  + What are you finding challenging in your role?
* Check-in notes are meant to be a permanent record.
* Avoid distractions while checking-in with your employees. Active listening encourages two-way dialogue and makes team members feel like a priority versus an obligation.
* While meeting with your team member ask questions and avoid taking lengthy notes. Jot down key points and record your check-in in the HRIS (ideally immediately after the meeting).
* These interactions are meant to be low/no-pressure conversations that foster open and supportive communication. The notes recorded about said interactions should be written with the understanding there is an audience. Entries may be referenced when developing action or performance improvement plans, or for other purposes that support meeting Library initiatives.