Check-in Conversations
Employee & Supervisor Preparation Guide & Conversations Notes

The goal of our check-in conversations is to have open, honest, and constructive dialogue about each individual's contributions at work—practicing candor with care. These conversations aim to:

- Reflect upon and learn from past efforts
- Discuss current priorities (e.g. professional, personal, team, etc.)
- Aspire to and plan for the future.

It is a conversation about shared responsibilities that center upon the ongoing performance of work, your professional and personal well-being, as well as your professional growth. Reflect upon your past actions, achievements, and concerns, and come prepared for a two-way, feedback exchange with your supervisor about important work-related matters. You are encouraged to write down your reflections, though it is not required. The questions below can be used as a guide to prepare for and participate in the conversation.

<table>
<thead>
<tr>
<th>Past (6 months)</th>
<th>Present</th>
<th>Future (6 months)</th>
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</thead>
<tbody>
<tr>
<td><strong>A Reflection</strong></td>
<td><strong>A Check-in</strong></td>
<td><strong>A Plan</strong></td>
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<tr>
<td>What have we learned?</td>
<td>What’s working/not working?</td>
<td>What are our goals?</td>
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<tr>
<td>1. What are some highlights or things worthy of discussion?</td>
<td>1. How is one doing and/or getting along with others?</td>
<td>1. What are the areas for growth or continued development in current position?</td>
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<td>2. What are some accomplishments or reasons to celebrate?</td>
<td>2. What is one doing well, what are one’s strengths?</td>
<td>2. What improvements or innovations can be made in the work, office, position, or team?</td>
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<tr>
<td>3. What are lessons learned or opportunities for improvement?</td>
<td>3. What support or assistance is needed at present?</td>
<td>3. What new skills or opportunities can be pursued, if applicable?</td>
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</tbody>
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How are our values of belonging, curiosity, excellence, flourishing, integrity, respect, & service demonstrated—past, present, and future?

NOTES (provide comments, examples, or responses to the questions posed above):

Name/Signature __________________ Date ______  Supervisor ___________________ Date ______

___ Employee self-reflection attached?  ___ Additional documents attached (e.g. notes, awards, letters, photos, etc.)
CHECK-IN CONVERSATIONS COMPLETION PROCESS

1. Both parties will prepare for the Check-In Conversation.
   * Preparation will include reflection upon recent work activity and may include a review of goals, accomplishments, issues and opportunities.
   * Questions from the Check-in Conversations guide document should be considered; department-specific questions can be included as well.
   * Employee and/or supervisor may write down notes as a result of their reflection.
   * Both parties may bring additional documents to the conversation such as thank you notes, sample work, complaints, reports, etc.

2. Both parties come together for a two-way exchange about work over the recent period.
   * Discussion of the highest priorities of work based upon reflection and notes.
   * Shared Understanding of actions to be taken as a result of the discussion (e.g. changes, adjustments, (accolades room for positivity) improvements, goals. etc.).
   * Engage in full, honest, and earnest conversation about the a) work, b) workplace, and c) person and their relationships with coworkers; practicing ‘candor with care.’

3. Notes and results from conversation are preserved.
   * The results of the conversation are entered into the form on Cornerstone.
   * Either the employee or the supervisor may enter the notes, documents, or records of the conversation into Cornerstone.
   * Both parties can access the records at any time. The records can be reviewed as a part of the preparation for the next Check-in Conversation.

Other Activities:
* Either party can request an additional conversation prior to the next scheduled conversation to address opportunities, concerns, professional development, goals, etc.
* Either party can request a secondary review of the conversation or records of the conversation. The options include a) the supervisor’s supervisor, b) the Ombuds Office, or c) Human Resources
* If there are recognition-worthy actions or a performance-improvement plan that is warranted as a result of the Check-in Conversation, these trigger separate activities that occur outside of the Check-In Conversation.

___ Employee self-reflection attached? ___ Additional documents attached (e.g. notes, awards, letters, photos, etc.)