

# 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:

- a. reflect upon and learn from past efforts
- b. discuss current priorities (e.g. professional, personal, team, etc.)
- c. 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.**

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