**PREPARE / CONDUCT THE CONVERSATION**

**Directions**: Using the GROW (Goal, Reality, Options/Obstacles, Way Forward) framework, use the space below to *prepare* what you will ask/say to set expectations for the new fiscal year. Refer to the **ASK Questions** Job Aid for additional questions*.* Refer to your plan as you *conduct* the conversation to keep the discussion on track.

|  |  |
| --- | --- |
| **Action Steps** | **Notes** |
| **Step 1: GOAL** * What is your goal for this conversation?
* What expectations are on track? Off track?
* What is working and should be recognized and/or what needs to be addressed?
 |  |
| **Step 2: REALITY*** What circumstances, events, resources, change of priorities, etc. are influencing the status of goal completion. Use specific actions, facts, examples to describe; link the impact/ outcome to each.
* *How do you see as this expectation moving the unit/ agency forward?”*
* *“What constraints or limitations might get in the way?”*
* *“How would removing the barrier or constraint change things?”*
* *“What is needed to overcome the obstacles?”*
* *“Is this timeframe realistic?”*
* *“What can I do to help?”*
 |  |
| **Step 3: OPTIONS / OBSTACLES** * List specific options for accomplishing the expectation; include the impact/outcome for each.
* Identify what will get in the way of success (obstacles) and ideas for overcoming them.
* Ask (or refer to job aid for alternate questions)
* *“What are your thoughts for achieving this expectation?”*
* *“What obstacles get in the way?”*
* *“How will you plan to overcome these obstacles?”*
* *“What resources/support will you need?”*
 |  |
| **Step 4: WAY FORWARD** * Agree upon finalized goals to achieve expectations.
* Ask if the employee is committed to the plan. *If not, why not?* Return to Steps #2 and #3 to resolve.
* *“Are you committed to this plan?”*
* Round out your discussion by asking for feedback.
* “*What feedback do you have for me?*
* Establish a cadence of follow up Check-ins *(once per quarter at minimum).*
 |  |

**DEBRIEF THE CONVERSATION**

**Directions (both Manager & Employee):** Complete the following independently by checking two or more actions that you did well; then highlight one action you will do differently at your next Check- in or daily discussion. Discuss each of your perspectives to reinforce strengths and to support one another’s continuous improvement. *Refer to your highlighted action in your planning for the next Check-in.*

|  |  |
| --- | --- |
| **✔** | **Evaluate Skill Use & Determine Next Steps**  |
|  | 1. Opened by stating the purpose/goal of the conversation.  |
|  | 2. Used open-ended questions to draw out more in-depth information such as: *What do you think*? *Tell me more … How does this impact*…? |
|  | 3. *Summarized* to reflect back to the other person what you heard them say in your own words. STOPPED talking to let the other person respond.  |
|  | 4. *Empathized* to acknowledge the other person’s feelings *(Manager) “You’re frustrated when I don’t follow through.”* Or *(Employee) “It’s* *disappointing when you don’t* *follow up*.” |
|  | 5. Asked questions to explore the other’s **perspective** or **intentions**.  |
|  | 6. Was SPECIFIC about feedback and linked it to its impact or outcome. Focused on behavior (what can change) and *not* the person’s personality. |
|  | 1. Utilized the SARAH Cycle and 3 Triggers to manage defensiveness.
* SARAH Cycle (Don’t get stuck in emotion; Accept others’ perspective; Help = ask questions)
* Triggers: Truth / Relationship / Identity
 |
|  | 8. Established an action plan (Way Forward) towards achieving the expectations for the year. |
|  | 9. Determined commitment to the Way Forward by asking, “*Are you willing to commit to the plan*?” and/or “*What will get in the way of your commitment to this action plan?*” |
|  | ***What is one action that you will do differently at the next Check-in or daily discussion*?** |