**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.

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| **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.*

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| **✔** | **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*?** |