# Check-in Conversation Guide & Template

for staff and supervisors

Performance Excellence Job Aid

This job aid supports staff and supervisors in having meaningful check-in conversations, sharing important information and clarifying next steps. Check-in conversations are recommended at least quarterly. Staff members and supervisors can use this job aid to prepare for a check-in conversation and/or record check-in notes.



Performance Excellence is a year-round experience, which is most successful when both staff and supervisors engage in conversations about goals, performance, and development throughout the year.

###### Sample check-in agenda

1. Discuss priorities, goals and responsibilities
2. Discuss performance or development
3. Clarify next steps

*When using this document to record notes, the recommendation is to “save as” with a current date, and upload as an attachment to the performance review in myHR Learn (it will be visible to both staff and supervisor)*



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|  | **GETTING THE CONVERSATION STARTED** |
|  | **STAFF** | **SUPERVISOR** |
| **PRIORITIES & GOALS** | Here are my updatesHere are my key questions or topics I’d like to discuss todayWhat new priorities have emerged for our area?I am focused on \_\_\_\_; how does that align with current priorities? | What’s going especially well?What challenges have you encountered?How are you going to approach this?What are your plans to get there? |
| **PERFORMANCE** | Here’s something I’ve noticed about my performance recently.What am I doing well and should continue?The next time there’s a project like this, what’s one thing I could do better? | Here’s something I notice you doing well (specific behavioral example, impact).Here’s something I’ve noticed and would like to discuss (specific behavioral example, impact). How does it look to you? |
| **DEVELOPMENT** | I am interested in developing this skill/knowledge area. What growth opportunities do you see for me?Here’s something I’m interested in. Can we discuss? (Workshop, online learning certificate/degree program, conference/event, upcoming project) | What are you enjoying about your role?What’s one of your skills you’d like to use more?Are there any projects you want to be more involved in? On-the-job experiences you’d like to have? |
| **NEXT STEPS** | Here’s what we discussed (summarize)My to-dos are…Here are the resources or support that we agreed you will provide | Here’s what we discussed (summarize)Here’s what I hope to see in our next meetingWhat additional support do you need? |

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|  | **CHECK-IN NOTES** |
|  | **Staff name:** | **Date:**  |
| **PRIORITIES & GOALS** |  |
| **PERFORMANCE** |  |
| **DEVELOPMENT** |  |
| **NEXT STEPS** |  |