*Use this document to help structure your monthly/quarterly informal check-in meeting with employee.*

Employee Name: Date:

|  |
| --- |
| 1. DISCUSS ROLES AND RESPONSIBILITIES FOR Check-INS |

Consider which of the following **you** **(immediate management supervisor)** may need to focus on:

* Communicate vision and strategy, and clarify the employee’s role in the big picture
* Provide clear expectations for results and behaviors
* Define what success looks like
* Bring goals and expectations into regular feedback and coaching conversations

Consider which of the following the **employee** may need to focus on:

* Ask questions
* Be proactive when work seems misaligned with broader goals
* Seek, accept, and act on feedback
* Take ownership for own career and development – set goals, seek opportunities, ask for guidance when needed

|  |
| --- |
| 2. REVIEW Long-TErm GOALS; FOR NEW ASSIGNMENTS, DISCUSS EXPECTATIONS  |

Review the employee’s goals:

1.

2.

3.

4.

5.

How is this employee’s day-to-day work connected to the goals of your department or institution? If the employee is unclear on these connections, this would be a good starting point for a check-in conversation.

Flexible Goal Setting for New Projects or Assignments (discuss the following questions):

1. How does this project or assignment fit into the employee’s annual goals? If it does not, discuss why it makes sense for this employee to take on this project or assignment.
2. What does success look like?
3. What skills, knowledge, and abilities (behavioral competencies) will be most important?

|  |
| --- |
| 3. Evaluate current progress and provide coaching to Support Development |

For ongoing projects or assignments, discuss (informally):

1. What progress has been made?
2. What challenges or obstacles are getting in the way of progress?
3. How might these challenges or obstacles be overcome or addressed?
4. What behavioral competencies will be most important for success?
5. What is going well, and what accomplishments can be recognized with positive feedback?

Provide feedback and coaching:

* Consider the employee’s level of self-awareness and motivation to learn from feedback. If they are not aware or self-motivated, address this first.
* Consider if feedback will be useful at this point. If yes, help the employee understand their behavior and the impact of their behavior. Provide positive feedback and recognize the good work, as it is a powerful way to reinforce effective behaviors and motivate higher performance.
* Consider whether training for a new skill would be helpful.
* Provide an opportunity for reflection – what is going well and what can be improved.
* Discuss opportunities for the employee to apply and master their skills through their projects and assignments.

|  |
| --- |
| 4. determine next steps |

Before ending your check-in conversation, discuss:

1. What steps will the employee take before the next check-in to make progress on goals?
2. What support does the employee need from management?