

Check-in Conversations

A Staff Guide

Regular Check-in Conversations are fundamental, fostering two-way discussions between staff and managers. These conversations help build a culture of success, shared learning, and involvement at UBC. Through successful Check-ins, staff have dedicated time to share and discuss goal updates, projects, request feedback, and explore topics such as well-being, professional development, and careers. Managers help promote collaboration and mutual understanding with their staff, gaining insights into diverse perspectives while providing clarity, guidance, and timely alignment with organizational goals.

This guide is designed to provide practical prompts and examples that will support staff in preparing for, participating in, and reflecting on Check-in Conversations with their managers.

Follow the three principles of effective conversations:

UBC aims to cultivate an environment where staff can thrive and grow. When it comes to Check-in Conversations the following three principles inspire the conditions necessary for generative, meaningful and authentic, two-way dialogue.

STRENGTHS-BASED

Recognizing and highlighting what is working well in others.

CREATIVE DISCOVERY

Unlocking potential through collaboration, care and curiosity.

MUTUAL LEARNING

Recognizing you both have something to share and learn.

Before Check-in Conversations, be sure to prepare:

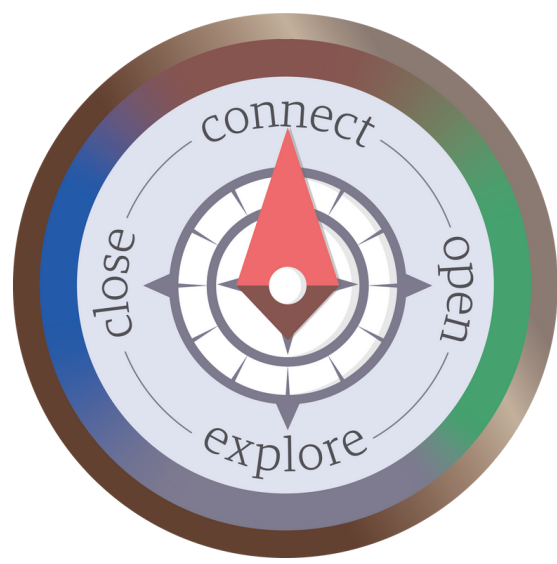
Preparation significantly enhances the quality of Check-in Conversations. Staff are encouraged to co-create agendas with their manager prior to the Check-in Conversation. Be sure to come with updates on goal progress and any relevant supporting materials.

Consider the following questions:

- What topics and areas should I include in the agenda for our discussion?
- What tasks and actions did I commit to follow up on, and what updates or important matters should I address?
- What challenges have I been facing, and how I am managing them?
- What achievements am I proud of regarding my goals?
- What feedback or insights am I hoping to obtain?
- Which resources or past conversations should I refer to for a meaningful discussion with my Manager?

During Check-in Conversations, consider the COEC Model:

To assist managers and staff in having more effective and co-created conversations, the GPS Program recommends using the Connect, Open, Explore, Close (COEC) Model. This communication model was developed in-house in partnership with Coaching Services, Central HR and Extended Learning. The COEC Model offers a structured framework for staff and managers to engage in more connected and effective conversations.



CONNECT: Cultivate trust and safety

It is important to take a bit of time to connect before diving into the agenda of any conversation. It allows both parties to transition from their previous engagement, settle in with each other, and demonstrate care and interest beyond the task or agenda on hand. Making an effort to connect in a genuine manner signals a commitment to the relationship you have with your manager and the ongoing Check-in Conversations you have together.

Connect by:	Tailor the examples to fit your context:
• Grounding the conversation in care, including the whole person, well-being, and interests. • Acknowledging your manager for recent outcomes affecting your work, team or portfolio. • Listening fully, paraphrasing, and demonstrating a participatory, non-directive approach. • Encouraging diverse viewpoints and exploring ways to contribute to learning.	• <i>'How are you doing these days both at work and outside work?'</i> • <i>'I appreciate your leadership in the recent project. I wanted to take a moment to reflect on the following...'</i> • <i>'It sounds like... I'm looking forward to this and committed to having an honest conversation.'</i> • <i>'Your insights as my manager are valuable to me, and it would mean a lot if we could address some issues I'm experiencing.'</i>

OPEN: Co-create purposeful dialogue

A good opening to a conversation helps to create alignment around expectations, approach and desired outcomes. By confirming where you are in your goals, work priorities and aligning on how you want to use the time together, you create a shared vision for success. A purposeful dialogue based on an agenda enables a productive and engaging Check-in Conversation.

Open by:	Tailor the examples to fit your context:
• Asking clarifying questions about the objectives for your shared time. • Building the discussion on an agenda that highlights key topics and areas needing attention. • Considering previous Check-ins and any overlooked topics you would like to explore. • Asking questions, exploring and confirming expectations. • Anticipating and addressing potential barriers with curiosity and agreeing on success measures .	• <i>'What would you like to focus on today? Here are the points I'd like to include.'</i> • <i>'I'd appreciate it if we could cover the following topics during our Check-in Conversation.'</i> • <i>'It would be beneficial to include these topics from the recent Check-in as part of today's agenda.'</i> • <i>'Help me understand your thinking. Tell me more about this.'</i> • <i>'Could we agree on how we'll measure success for this project?'</i>

EXPLORE: Collaborative in a creative and productive manner

Exploration is central to Check-in Conversations. It is about listening, asking open-ended questions, inquiring, sharing perspectives, surfacing ideas, and challenging assumptions. In a true two-way conversation, exploration invites the manager and staff to activate their creative thinking and to find solutions, explore successes and setbacks, generate new ideas and identify opportunities that move the work forward.

Explore by:	Tailor the examples to fit your context:
• Evaluating your progress on your goals and sharing both your achievements and setbacks. • Identifying where you might need more assistance and communicating needs clearly. • Seeking different perspectives, generating ideas and solutions. • Establishing alignment around goals, values and priorities. • Considering the type of feedback that energizes you and is valuable. • Recognizing setbacks in your work, determine what support would help address them. • Reflecting on what would make you feel like your work successes are visible and appreciated.	• <i>'Since our last meeting, I've achieved progress with certain projects, particularly in the following.'</i> • <i>'While I've seen success in the following, I've identified a gap that needs addressing.'</i> • <i>'I'm hoping to discuss some deliverables. Can you share your thoughts on how to approach them?'</i> • <i>'Can we discuss how my current goals are aligning with our team's priorities?'</i> • <i>'I'd appreciate constructive feedback on my progress with goals/projects.'</i> • <i>'The resources you provided were helpful; having more access to them would further support me.'</i> • <i>'I'm proud of reaching a milestone in the project and believe building on this success would be beneficial.'</i>

CLOSE: Confirm insights, actions and commitments

Bring the Check-in Conversation to a close by reviewing the agenda and expectations and confirming agreed-upon takeaways and next steps. Close allows both staff and manager to contribute to the final summary of key points, actions and commitments. A strong close provides an opportunity to express acknowledgement while setting the expectation for future Check-ins Conversations.

Close by:	Tailor the examples to fit your context:
• Checking in on desired outcomes, important takeaways and next steps moving forward. • Reflecting on the key insights gained from the conversation. • Recognizing and appreciating mutual learning experiences. • Planning next steps you can take to progress toward your goals. • Strengthening and valuing the respectful relationship you are building.	• <i>'Let me share what I see as the next steps moving forward. What are your thoughts on the focus areas?'</i> • <i>'My main takeaways from this conversation are as follows.'</i> • <i>'Here is what I appreciate most about today's conversation.'</i> • <i>'I intend to stay on track with my commitments. However, I need your assistance with the following.'</i> • <i>'I appreciate the respectful relationship we're building. Your support and feedback have been incredibly valuable.'</i>

After Check-in Conversations, be sure to reflect:

To make your next Check-in Conversation even more effective, it's important to prepare, practice, and reflect.

Consider the following questions:

- What are the key points I need to remember or document for our next Check-in Conversation?
- What did I appreciate most about today's conversation?
- Which aspects of the conversation were challenging?
- What have I learned about myself, my manager, and my work?