PATI Framework: Purpose, Assessment, Tactics, Implementation  
March 2020

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| **Step** | **Techniques, tips, methods** | **Useful questions or topics** |
| **Check-in:**  Participants have the opportunity to express the internal and external influences and factors that they are bringing into the conversation. | * Active listening * Round robin * Think pair share * Small breakout groups | 1. How are you doing today? 2. What’s on your mind? 3. Good news to share? |
| **Purpose:**  Establish an intended outcome for the (conversation, meeting, planning). | * Framing * Visioning | 1. How should we focus our work together today? 2. To what end? 3. Audience: Who will benefit? |
| **Assessment:**  Determine the factors that help or impede efforts to achieve the stated purpose. | * Emotional intelligence (self and situational awareness) * Covey’s Circles of Influence and Concern * Hinders/Helps or Barriers/Enablers | 1. What is getting in the way of achieving our purpose? 2. What will help us achieve our purpose? 3. What is in our control? 4. Who/what can we influence? |
| **Tactics:**  Identify the tactics or steps that, based on the assessment, can best help with accomplishing the purpose. | * Generate, organize, select * Choose your adventure | 1. What one, two or three things could we do to make a difference in this situation? |
| **Implementation:**  Develop a pathway for implementing the tactics and evaluating/assessing their effectiveness. | * Know, use, own * Choose your adventure * First steps, next steps * Indicators | 1. What do we need to know before we can begin? 2. What actions will we take based on that information? 3. Who, what, when? 4. How will we determine if we’re successful? |
| **Check-out:**  Participants have the opportunity to name any thoughts or feelings that they have as they are leaving the conversation. | * [Feelings Wheel](http://feelingswheel.com/) * [After Action Review (AAR)](https://www.cebma.org/wp-content/uploads/Guide-to-the-after_action_review.pdf) | 1. Any final thoughts, need-to-knows? 2. Identify a feeling on the Feeling Wheel 3. AAR questions:    1. What was supposed to happen?    2. What did happen?    3. What should be done differently?    4. What should be kept the same? |

**The PATI Framework Cycle**