



Extension

UNIVERSITY OF WISCONSIN-MADISON
ORGANIZATIONAL AND LEADERSHIP
DEVELOPMENT PROGRAM

PATI Framework: Purpose, Assessment, Tactics, Implementation

March 2020

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.	<ul style="list-style-type: none">• Active listening• Round robin• Think pair share• Small breakout groups	<ol style="list-style-type: none">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).	<ul style="list-style-type: none">• Framing• Visioning	<ol style="list-style-type: none">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.	<ul style="list-style-type: none">• Emotional intelligence (self and situational awareness)• Covey's Circles of Influence and Concern• Hinders/Helps or Barriers/Enablers	<ol style="list-style-type: none">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?



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<p>Tactics:</p> <p>Identify the tactics or steps that, based on the assessment, can best help with accomplishing the purpose.</p>	<ul style="list-style-type: none">• Generate, organize, select• Choose your adventure	<ol style="list-style-type: none">1. What one, two or three things could we do to make a difference in this situation?
<p>Implementation:</p> <p>Develop a pathway for implementing the tactics and evaluating/assessing their effectiveness.</p>	<ul style="list-style-type: none">• Know, use, own• Choose your adventure• First steps, next steps• Indicators	<ol style="list-style-type: none">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?
<p>Check-out:</p> <p>Participants have the opportunity to name any thoughts or feelings that they have as they are leaving the conversation.</p>	<ul style="list-style-type: none">• Feelings Wheel• After Action Review (AAR)	<ol style="list-style-type: none">1. Any final thoughts, need-to-knows?2. Identify a feeling on the Feeling Wheel3. AAR questions:<ol style="list-style-type: none">a. What was supposed to happen?b. What did happen?c. What should be done differently?d. What should be kept the same?



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The PATI Framework Cycle



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