Check-in Meeting Agenda Template

|  |  |  |
| --- | --- | --- |
| **Priorities** | **Paused for now**  *(will resume once the crisis subsides)* | **Not-to-do**  *(may never get to / no clear timeline)* |
|  |  |  |

## Personal check-in

*Ideas for questions: How are you and your loved ones? How are you feeling about everything on your plate (in work and life)?*

## Top desired outcomes for this week:



## Items for discussion

Projects to discuss/share updates on:



Organizational updates/input:



Priorities check (changes since last check-in, new assignments from the manager, overall workload):



## Learning / Feedback

|  |  |  |  |
| --- | --- | --- | --- |
|  | Something the staff person did well / something to celebrate | Something the staff person could improve for next time | Something the manager could do to (better) support the staff person |
| Staff member |  |  |  |
| Manager |  |  |  |

## Next steps / Repeat-back

*Include: Follow-up needed, asks for help from others, “slices” to share/review by next check-in, etc.*



Check-in Meeting Agenda Template

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| --- |
| About this Sample In the sample below, “JW” is the manager and “QX” is the staff person. JW is the Communications Director and QX is the Communications Coordinator and they have weekly one-hour check-ins. Below are notes they jotted down to prep for their meeting. |

|  |  |  |
| --- | --- | --- |
| **Priorities** | **Paused for now**  *(will resume once the crisis subsides)* | **Not-to-do**  *(may never get to / no clear timeline)* |
| * Send out weekly newsletter * Create a “COVID-19 resources” section on website * Work with the edequity team to launch a new newsletter | * Marketing reports * Internal newsletters - please just be sure to send email to let folks know * Managing projects template | * Inactive subscriber campaign * Social media (let’s revisit in fall or early 2021 - we just can’t prioritize monitoring Twitter right now) |

# 3/30 Check-in

No need to write this down in advance, but don’t skip this!

## Personal check-in

*Ideas for questions: How are you and your loved ones? How are you feeling about everything on your plate (in work and life)? What’s new or different in your life since we last checked in?*

## Top desired outcomes for this week:

What are 1-3 outcomes that would make this week a success?

1. Get main newsletter out by Tuesday am (Monday evening would be a stretch) — we get at least a 25% open rate within the first 24 hours.
2. Launch educational equity newsletters!

## Items for discussion

**Projects to discuss/share updates on (QX):**

* COVID-19 resources section — should we link to previous COVID-19 specific newsletters?
* Project template — we had this on the backburner/on pause, but since the training is coming up soon, should we revisit to make sure this is updated before the 4/15 training?

Make sure to share, follow up, and get input on organizational developments.

**Organizational updates/input (JW):**

* New PTO policy in place — making sure you know about this!
* Digital security — did you see the email from HL about updating passwords?
* Do you have any input about how we (as an organization) are responding to this situation?

**Priorities check** (changes since last check-in, new assignments from the manager, overall workload):

The “priorities check” is your chance to review and update the chart at the top of this agenda.

* QX: overall workload feels good now that we have established a new rhythm
* JW: I might pull you in as a helper on the remote management webinars — stay tuned!

## Learning / Feedback

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Something the staff person did well / something to celebrate** | **Something the staff person could improve for next time** | **Something the manager could do to (better) support the staff person** |
| **Staff member** | Got the newsletter out 12 hours early! The key was setting aside a work block on Monday so I could really focus on all the changes - not just assuming I’d find the time. | I spent more time than was necessary on tweaking templates — next time I’ll check in with you first to make sure it’s worth the energy. | Can you block off time earlier to review test blasts? I know you have a lot going on, but right now, getting past the test blast stage is our biggest bottleneck in getting the newsletters out. |
| **Manager** | You got the newsletter out ahead of our timeline! Love your reflection on how - maybe apply this on web changes too? | Great point on checking in with me on templates - I think the key thing was to find a way to offer “slices” earlier - we could have saved you a lot of time, and good for you to own making that happen. | I wish I had made the call earlier to deprioritize the internal newsletters or (better yet) had checked in with you about it sooner — I didn’t realize this was something you were still dedicating energy to. |

## Next steps / Repeat-back

**This part is key.** Don’t forget to capture next steps and actions items *during* the check-in!

*Include: Follow-up needed, asks for help from others, “slices” to share/review by next check-in, etc.*

* QX send JW preview of COVID-19 resources section (4/3)
* QX reach out to MR about tracking metrics for ed equity newsletters (4/1)
* JW check with CF about project plan template (4/1)