**Check-in Meeting Agenda Template**

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| **About This Tool**Our check-in meeting agenda template covers the main items that we believe most check-ins should include. We encourage you to review this template with your manager/staff to customize this tool to meet your needs.We encourage staff to own their check-ins, which means that they should drive the meeting and prepare the agenda at least a few hours in advance. However, you (the manager) should keep a list of items you want to discuss. For more support, see [7 Tips for Making the Most of Check-ins](https://www.managementcenter.org/resources/7-tips-making-most-your-check-ins/).**Additional notes:*** To use this as a **running document** (such as in a shared Google Doc), we recommend that you keep the reference documents and priorities chart at the top of the page or in the header. Add new dates beneath the priorities chart, so that your document reads in reverse chronological order.
* Below is a chart that details some possible components of your check-in agenda. Consider this a menu of options to choose from (or add to) to meet your needs—**you don’t need to cover everything at every check-in!**

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# **Check-in Meeting Agenda Template**

**Reference Documents**

|  |  |  |
| --- | --- | --- |
| **[month or quarter] Priorities** | **Annual Priorities/Goals** | **Backburner** |
| *
*
 | *
*
 |  |

# **[Date]**

**Personal check-in**

**This week will be successful if… (Big Rocks / Top Priorities)**

**Key updates / FYI**

*
*
*

**Feedback & Learning**

|  |  |  |
| --- | --- | --- |
|  | **One success**  | **One area for improvement** |
| **Staff member self-reflection** |  |  |
| **Staff member feedback for manager** |  |  |
| **Manager self-reflection** |  |  |
| **Manager feedback for staff member** |  |  |

**Items for discussion**

*

**Manager’s list:**

*
*

**Next steps**

**Check-in Meeting Agenda Sample: MT & RO**

# **Reference Documents**

* Team/individual goals <link>
* Role expectations <link>

|  |  |  |
| --- | --- | --- |
| **Q1 Priorities** | **Overall Priorities / Goals** | **Backburner** |
| * Send quarterly survey to coalition members
* Lead 15 tenants’ rights webinars
* Recruit volunteers for membership committees
* Hire housing rights coordinator
 | * Strengthen housing rights coalition and broaden our reach by recruiting 3 local organizations to join by June. These organizations should work with communities that are not currently represented in the coalition.
* Fill housing rights coordinator vacancy by end of Q3.
* Grow membership base. By end of year, at least 2,500 people (of which 40% identify as BIPOC) will have been trained through our leadership development programs.
 | * Volunteer leadership team retreat planning (postponed until Q3)
* Reorganize Dropbox folders
* Revamp train the trainer curriculum
* Grant proposal support
* Online advocacy center overhaul
 |

# **7/31**

**Personal check-in**

* Highs: We got a puppy!
* Lows: Not exactly a low, but I’m moving soon and it’s a bit stressful

**This week will be successful if… (Big Rocks / Top Priorities)**

* All materials for training finalized and out the door by Thursday night
* Conference presentation started & on track to be done by end of next week
* Newsletter draft complete, ready to upload and schedule

**Key updates / FYI**

* Training: outline/agenda completed, materials for 1st training about to be finalized
* Housing: new coalition member orientation completed and members have been plugged into working groups
* Outreach: newsletter and social media on schedule

**Feedback & Learning**

|  |  |  |
| --- | --- | --- |
|  | **One success**  | **One area for improvement** |
| **Staff member self-reflection** | I noticed that not all of our housing volunteers had access to our resources (or felt comfortable reaching out for help). I set up a volunteer call to go over resources and to encourage folks to reach out with questions. Since then, the volunteers seem a lot more confident and connected. | Our volunteer show-up rates have been below average these last few weeks and I think it’s because I let confirmation calls fall off my plate. From now on, I’ll make sure to do at least one round before each action. |
| **Staff member feedback for manager** | I really appreciated the pep talk you gave me before the last training. You knew I was feeling stressed about it, and you took the time to encourage me and remind me that I know what I’m doing. It made a big difference. | It’d be helpful if you could share more of your bigger picture thinking and planning for the rest of the year. I know what I’m responsible for, but sometimes it feels untethered to our team priorities. |
| **Manager self-reflection** | I’m glad that I was able to support you this week, and that you were comfortable enough to come to me when you were anxious about the training. | I haven’t done the best at communicating some of the broader organizational shifts because we’ve been so focused on the nitty-gritty work. Moving forward, I’ll make sure to incorporate more updates into our check-ins. |
| **Manager feedback for staff member** | Coalition meetings have been efficient. Great job setting a clear purpose and agenda for each meeting! Our members seem bought in and engaged, and I’ve noticed that even our newest members have been contributing. | I’ve noticed that you tend to spend more time with volunteers that you’re more familiar with or have more in common with. Now that our team is growing, it’s important to make sure that everyone feels the same level of welcome and belonging. |

**Items for discussion**

* Program associate opening — Can we brainstorm candidates/sources? I’ve already posted on the usual websites/lists, but could use your help thinking of other ways to build the pool.
* Coalition—getting pushback from AWM; would love to talk this through
* Conference talk debrief

**Manager’s list:**

* Mid-year evaluations
* Partnering with XYZ organization—what do you think?
* Questions about the leadership team’s announcement at last staff meeting?

**Next steps**

* MT reach out to Rebecca about facilitating upcoming meeting
* RO send MT sample agenda

**Potential Check-in Template Components**

|  |  |
| --- | --- |
| **Item** | **Purpose** |
| **Reference documents** | Link to reference documents like role expectations, goals, and other resources. **Tip:** Add it to your header (first page only) so it’s always at the top of your document. |
| **Priorities chart** | Track monthly, quarterly, or annual goals or backburner items… Or replace this with something else to track medium- and long-term big rocks!**Tip:** Add it to your header (first page only) so it’s always at the top of your document. |
| **Date** | To use as a running document, use headings for each check-in date. Add new dates to the top of the document (after the priorities chart and reference documents) so that your headings are in reverse chronological order.**Tip:** Add a table of contents so that you can easily reference previous meeting notes. |
| **Personal check-in** | Connect personally and get a sense of how the other person is doing overall. We’ve found that it’s usually easiest (and more natural) to keep this informal. **Note to managers:** As the person with positional power, you will likely set the tone for how much and what you share. The personal check-in is your opportunity to model and create space for authenticity, which is a key component of [relationship-building](https://www.managementcenter.org/resources/four-elements-strong-relationships-managers-guide-relationship-building/). |
| **Big Rocks / Top priorities** | The staff member should use this section to complete the sentence, “this week will be successful if…” Focus on your 1-3 top desired outcomes. |
| **Key updates / FYI** | Follow up on the previous week’s priorities and share updates, news, or other FYIs. Written updates can save time during the meeting for focusing on areas that need discussion or decision-making.**Tip for managers:** Read the agenda in advance and add notes of encouragement or follow-up questions. |
| **Feedback & learning** | Regular, 2-way feedback will help you build your relationship and cultivate a strong feedback culture. Depending on your context, you may opt to do feedback once a month or biweekly (rather than weekly).  |
| **Items for discussion** | This is space for the staff member to ask for input, approval, or support. **Tip for managers:** This is also where you can do a “priorities check” during busy or hard times—review the staff member’s workload and capacity and de- or [reprioritize](https://www.managementcenter.org/resources/how-to-actually-reprioritize/) as needed. |
| **Manager’s list** | Keep track of your priority discussion items (including new projects to [delegate](https://www.managementcenter.org/resources/delegation-worksheet/) and organizational updates and reminders).  |
| **Next steps** | Do a written repeat-back or keep track of action items. |