

## MEETING AGENDA

**Date:** [Click here to enter a date.](#)

**Time:** [Click here to enter text.](#)

**Facilitator:** [Click here to enter text.](#)

**Purpose Statement:** [Click here to enter text.](#)

<b>AGENDA ITEM</b> (To be completed prior to the meeting)	<b>TIME &amp; LEAD</b> (To be completed prior to the meeting)	<b>NOTES</b> (To be completed during the meeting; include decisions and action steps)
Evaluate the meeting	5 Minutes Led by facilitator	

## FOLLOW-UP

Team Action Items: [Click here to enter text.](#)

Individual Action Items: [Click here to enter text.](#)

### EVALUATION

We stayed on track. ☐ No ☐ Yes

Everyone participated. ☐ No ☐ Yes

I know my next steps. ☐ No ☐ Yes

### NEXT STEPS

Meeting Purpose: [Click here to enter text.](#)

Facilitator: [Click here to enter text.](#)

Date/Time: [Click here to enter text.](#)

PROJECT	DELIVERABLES	DEADLINE	ROADBLOCKS	EVALUATION*
Course Creation for Q1 Education	Content approved by SMEs	August 1: Unmet	Peggy Jones' vacation impacted ability to approve content on HIPAA	Does Not Meet Expectations
	Design developed	September 1: Met		Exceeds Expectations
	Course loaded to LMS	September 30: Pending		
Community Education	Coordinate education for Rotary club	August 15: Met		Meets Expectations
	Facilitate CE's for nursing facility education	August 30: Met		Meets Expectations
Leadership Development Institute	Needs analysis completed	October 1: Met		Meets Expectations
	Content draft approved by Executive leaders	October 21: Unmet	Executive team disagreed with suggestion to focus on accountability	Does Not Meet Expectations
	Content draft #2 approved by Executive leaders	November 4: Met		Meets Expectations

\*EVALUATION:

(3) Exceeds Expectations

(2) Meets Expectations

(1) Does Not Meet Expectations

# Performance Log | 2013

Employee Name: Sarah Hartman

Employee Title: Corporate Trainer

DATE	INCIDENT	FEEDBACK
5/6/2013	Sarah arrived at work at 9AM this morning, 30 minutes late.	I verbally reminded Sarah that she had been late twice this month and coached her to plan ahead so her mornings run more smoothly in the future.
7/12/2013	Amy Finley's mother died and she was scheduled to teach an evening class. Sarah volunteered to work late and cover the class.	I thanked Sarah, as well as wrote her a Gold Leaf Award.
8/1/2013	Received an email from the Finance department regarding Sarah's help with their presentation. (Email saved in file.) They were very appreciative of her work.	Reviewed the email at our weekly meeting and encouraged her communication with the finance and other teams.
8/28/2013	Sarah arrived 45 minutes late to work.	Verbal warning that the next time she is late I am going to formally write her up for attendance.
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# Recognition Preference Form

**What do you love about your job?**

**What can I do to make your job more satisfying?**

**Do you prefer recognition in front of your peers or private recognition?**

**Which would you prefer:**

to be recognized for your performance by being given control over a more prestigious project  
**or**  
receive a weekend getaway for two?

a sincere thank you card for overtime on a special project  
**or**  
having your efforts recognized in front of your team?

a cash bonus for being the top sales performer during the quarter  
**or**  
a week in Hawaii presented at the quarterly sales meeting?

having your family present when you receive an award  
**or**  
having the VP personally recognize your achievement one to one?

the opportunity to telecommute one day a week  
**or**  
the opportunity to attend a professional development conference on the topic of your choice?

**What's your favorite...**

Work-time Beverage?

Snack?

Magazine or Blog?

Place to get lunch?

Flower?

Ice cream flavor?