

Sample Progress Checkpoint Agenda.

Progress checkpoints on professional development plans should happen regularly and consistently (i.e. 1-2 times/month). These can be included as part of a weekly check-in or can be a separate meeting on their own. Whatever you choose, use the agenda below as a best practice to guide you through that conversation.

As a Reminder: Effective professional development plan “must haves”:

DEFINE ROLE-SPECIFIC COMPETENCIES	CO-CREATION AND JOINT ACCOUNTABILITY	REVISIT REGULARLY AND BUILD HABIT
UTILIZE THE 70-20-10 MODEL	IDENTIFY MEASURES OF SUCCESS	CONNECT TO YEAR-END EVALUATION

>>> Zooming in: Bringing Revisit Regularly and Build Habit to Life

Must Have	Best Practices	Watch Out For
Revisit Regularly/Build Habit	<ul style="list-style-type: none"> – Collaboratively identify regular progress checkpoints – Add this as a section to weekly check-ins (1-2x/month) – Share plan with leadership team and team members as appropriate who can help highlight growth for employee – Manager takes responsibility for ensuring follow up on progress checkpoints – Dedicate time to both project review and staff reflection 	<ul style="list-style-type: none"> – Allowing the plan to fall by the wayside – Focusing only on task completion vs learning and skill building



AGENDA TEMPLATE

TIME	TOPIC	PURPOSE	GUIDANCE
5 minutes	Welcome, Catch Up, Share Agenda	<ul style="list-style-type: none"> – Set the tone for the meeting – Employee knows what to expect – Employee can add anything on their mind 	<ul style="list-style-type: none"> – Share the agenda and ask if employee would like to add anything to the time together
20 minutes	Progress to Goal	<ul style="list-style-type: none"> – Check on progress toward the measures of success and process goals set at beginning of professional development plan – Reset goals if needed 	<ul style="list-style-type: none"> – Employee should send updates ahead of time so that manager can prep for this conversation. – Ensure the 70-20-10 document is open so that it can be referenced specifically. – Start with progress and strengths (let the employee answer the questions first) <ul style="list-style-type: none"> ▪ What benchmarks have been met? What has allowed you to do that? ▪ What benchmarks have not been met? What things may have played into that? – Once the employee has answered these questions, manager can answer questions. – Share any additional feedback (positive and constructive) [Reminder: Feedback should be specific!] – If you, together, realize certain portions of the PD plan are no longer applicable or accurate, use this time to readjust them.
15 minutes	Reflections on the process	<ul style="list-style-type: none"> – Check on the process itself – Build employee’s self-awareness and reflective capabilities – Reset process if needed 	<p>Ask the employee:</p> <ul style="list-style-type: none"> – How has the process felt? – What has felt easy/come naturally? Where else has that played out in your work? – What has been challenging? Where else has that played out in your work? – What does this make you want to continue to work on? What support might you need that you are not getting? – Are there any adjustments that need to be made to the process itself? – Share any feedback (positive and constructive) [Reminder: Feedback should be specific!] – If you, together, realize certain portions of the process are no longer working, use this time to readjust them.
5 minutes	Next Steps	<ul style="list-style-type: none"> – Get clear on next steps – Reset goals if needed 	<ul style="list-style-type: none"> – What needs to be true by the next time we have a progress check in on X date? – What can I do to support you in that?