



ENGAGE NOTEBOOK: SUPERVISOR EXAMPLE "JOURNAL" STYLE

2/15 -2 pm (Planning Notes)

Clarify Core Objectives

Go over David's list of standard work assignments from last year

- Primarily same as last year with the following exceptions
- Number of new outreach programs developed each year should increase from 2 to 3. Is this reasonable?
- Submit quarterly training schedule two months prior to the beginning of the next quarter instead of six weeks. Six weeks doesn't give us enough time to review and finalize.

Do any other objectives need to be changed or updated/why?

New Projects

- Ask David to work with Ann to come up with five ways to increase agency interest in our new Employee Recognition website.
- Submit ideas for my review by March 30. Implement at least two ideas by May 1.

Development Areas

It would help David to develop his customer relations skills. Discuss working more with contractors, contracts, follow up. We can pair-up on the next request. Then, David can solo with minimal oversight.

Feedback

The rollout of the new Leading Today webinar went well. The content was useful and relevant. David's research and attention to detail paid off! There were connection problems, though. Three people couldn't log-on and complained. Two people said they weren't sure how to use the chat pods. Some of this could have been avoided. Discuss steps to correct this.

What feedback do you have for me - how can I help?

(Conversation Notes)

-David had concerns about increasing the number of new outreach programs. Webinars are okay, but if it's a full day class, he's worried he has too much on his plate. We agreed to keep the number at 3 and to discuss progress on this more often to stay on track or revise if necessary.

-David mentioned that it's easier to remember items for his weekly status report if it's completed Friday instead of waiting until Monday. We agreed to make the change.

-David said that he stopped by several times to review content on his new webinar, but I wasn't available. I told David that devoting time for this is important and shouldn't be left up to chance. We agreed to start scheduling meetings for this in Outlook.

-David asked about attending the regional conference this year. I asked him to check on dates and cost so we can discuss it at our next meeting.

Post-conversation actions: My to do's

- * Make changes to David's core work assignment and copy David by 2/20.
- * Schedule a meeting with David and Ann next week to kick start their work on the Employee Recognition website.