

Planning meeting checklist.

Before the Meeting

- Gather all materials from the “What you will need” section
- Print a roster of employee birthdays and anniversaries (if necessary)
- Group the monthly printouts into quarters and tape them to the wall

Meeting Agenda

- Identify all Key Culture Events (KCEs)
 - Company quarterly meetings and leadership retreats
 - Employee anniversaries
 - Employee birthdays
 - Team building activities
 - Office closures
 - Seasonal events (holiday parties, Friendsgiving, Secret Santa, etc.)
- Organize your employees based on tenure for anniversary gifts
- Brainstorm and compile list of anniversary gifts or recognition for employees
- Brainstorm and compile list of birthday gifts or birthday recognition for employees
- Brainstorm and compile list of team building or cultural activities
- For each month, tally up the number of birthdays, anniversaries and cultural activities
 - Number of birthdays multiplied by the cost of the gift
 - Number of anniversaries multiplied by the cost of the gift
 - Number of company events multiplied by cost (lunch orders, materials, activities, etc.)
- Add all of the months together to calculate your annual admin budget
- Compile the list of brainstormed items and create a shared document
- Create a shared admin calendar for the admin team
- Add all of the events to a shared calendar
- Invite the rest of the team to the events
- High five, you're done!

What you will need:

- This checklist
- Blank monthly calendars for the upcoming year
- Giant poster sticky notes
- Sticky notes in five or more colors
- Markers

Please reference thejamesagency.com/annual-admin-planning-meeting for more information.