

Setting Goals

for the Year as a Board/Committee

The mid-year check-in is an important time to evaluate your relationship with your lay leader. A Mid-year check-in involves:

- Taking an honest look at what has been achieved and how the lay-professional relationship is, or is not, working. You can use the “STOP. START. CONTINUE. “technique,” as a “check-in” tool (see below).
- Determining what course of action should be taken if the relationship has gone off track; seeking out resources (advice, coaching, etc.) if help is needed to strengthen the relationship.
- Creating a succession plan – what needs to happen next in order to maintain Federation’s work, and who will be next to take on the mantle of leadership.

The STOP. START. CONTINUE. Technique

You can use the **STOP. START. CONTINUE** technique during your work with your partner to observe activities, strategies, and processes that you have been employing and evaluate how they are (or are not) moving you towards your goals. This simple and powerful technique compels people to identify their concerns, their expectations of change, and the solutions they can create to support their work.

With your partner, ask yourselves the following questions: At this time next year (or in 6 months):

- **What will be in place?**
- **What will we be experiencing?**
- **What will we have accomplished?**
- **What will have shifted?**

STEP 1

State one of your development goals for the upcoming year.

STEP 2

STOP – Things that are getting in the way. What do you need to stop doing right now in order to move towards your goals? What are you doing that has nothing to do with your goals, or is working against your goals? How are you getting in your own way? What is not serving your interests? What negative things have you been tolerating (e.g. other people’s behaviors, your own behaviors, low standards) and how can you stop tolerating those things as you move forward?

START – Things you want to put into place in order to improve the situation and achieve your goals. What can you start doing in order to achieve your goals? What new activities, attitudes, or behaviors can you initiate in order to move in the right direction? What do you want to bring forth in yourself in this new chapter? What can you start doing right now that will make a difference?

CONTINUE – Things that are working that you should keep doing. What do you want to continue that will help you to achieve your goals? What has been working well up until now, and how can you continue doing that? What are you currently doing that is consistent and aligned with the stated goals?

REVIEW WITH YOUR LAY LEADER:

PROGRAM/COMMITTEE ASSESSMENT

- Are we on track and achieving our goals?
- What's working well?
- What can be improved upon?
- What should we keep doing? Start doing? Stop doing?
- How do we define success for our committee/program/work? How can we achieve it?

**Review outcome measurements/ bench marks that were established at beginning of year and make necessary adjustments.*

THE INDIVIDUAL (CHAIR)

- How are you enjoying the work? Is it meeting your expectations?
- Is it what you anticipated? If not, how is it different?
- If it's not meeting expectations or positive, discuss ways to improve

THE LAY-PRO RELATIONSHIP

- How do you feel about our working relationship?
- What works well in our relationship? Where can we improve?
- Discuss communication style; any issues of concern
- Opportunity for mid-year lay-pro "re-contracting"

**This is a good opportunity for a course correction discussion in your working relationship, in the program/ committee, etc.*

ACCESS MAKE-UP OF COMMITTEE

- Is the committee accomplishing its overall goals? If not, what's missing and how can we get there?
- Are members clear on expectations, roles and responsibilities and meeting them?
- Are committee members fulfilled? Empowered through this experience? Feel valued and appreciated?

SUCCESSION PLANNING:

- Are the right people at the table? If not, what type of person/skill/demographic is not represented that should be?
- Who are the rising stars?
- Discuss next steps for succession planning – having conversations with potential leadership

INDIVIDUALS NEXT STEPS

- Discuss other involvements – past, present and future
- What do you want to do next? Where do you see yourself next year?
- What type of role do you want to take on? What are your interests? (Committee leadership positions, agency boards, campaign, hands on volunteering, work with a specific population, etc.). What are you passionate about?
- Where do you see yourself and your involvement in 5 and 10 years?
- What skills or knowledge could you use? Discuss how to obtain.
- Good opportunity to discuss long term giving as well

**Continue the conversation after the meeting – ongoing cultivation/stewardship*

Reflection:

End-of-year Evaluation

Before your chair transitions off your board or committee, take some time to reflect:

- Evaluate what has, or has not, been achieved over the course of the lay-professional relationship.
- Make an honest assessment of each partner's contributions to the shared work.
- Appreciate each other's contributions.

EVALUATE THE PROGRAM

Work with your chair to develop a memo to be sent from the chair to the entire committee. This memo/letter should review your overall committee accomplishments for the year. This memo should also thank the committee members for their service and commitment; letting them know that you will be following up individually to speak with committee members about their overall experience and their next steps, if applicable. (This conversation should take place regardless of whether they are transitioning off of the committee at the end of this year).

RECOGNITION

- If a committee member is rotating off, make sure that you send a personal thank you note from you and/or the Chair. At this time of year, it is very important that each volunteer feels appreciated for the time they served on a committee.

TRANSITIONING: What's next for the outgoing leader?

Creating plans for outgoing leaders helps to ensure their future involvement while gleaned important lessons learned from their tenure in their leadership position.

- Meet in person with your chair(s) to thank him/her, discuss the year as a whole, accomplishments, challenges, their overall experience, etc. Also discuss his/her interests going forward. **(If he/she is concluding the term, determine what the individual wants to do next. Get a range of interests.** (If he/she is not completing the term, it is never too early to begin this general conversation).

During your exit meeting, consider asking the following questions:

- What did you learn during your tenure in this leadership position?
- Are there particular aspects of the work, or new things that you saw/learned that piqued your interest? What should we be aware of in future planning?
- What do you think is next for your leadership?