

YEAR END ASSESSMENT: PLAN, ACT, REFLECT (THEN REPEAT)

Without reflection, we go blindly on our way, creating more unintended consequences, and failing to achieve anything useful.

--Meg Wheatley

The past does not predict the future but it can inform it. **The Year End Assessment** is a tool that enables you to assess the recent past and use the information gleaned to inform your thinking about what's next. Use this tool for yearly reflection and planning as part of an iterative process: Plan, Act, and Reflect.

THE VALUE OF REFLECTION:

1. Provides information that informs our thinking and actions.
2. Increases individual and group awareness, a key leadership and life skill.
3. Guides personal and professional development.
4. Enables a group to learn from their shared experience.
5. Builds group alignment around what is important.

REFLECTION AS A ROUTINE PRACTICE:

- *Individuals:* Complete the assessment yourself and use it to inform your planning.
- *Supervisors:* Ask your direct reports to prepare responses to the Year End Assessment prior to meeting with you. The information may be used to identify individual goals for 2015 and specific support they need to be successful in their role. Use this tool each year to make reflection and planning an ongoing process.
- *Team leaders:* Ask each member of your team to complete it. Compile a synopsis of their responses in advance and bring it to the team for discussion or facilitate a team conversation using the questions in the document as a discussion guide. Use the tool at the end of each year to build the team's muscle of ongoing reflection and planning.
- *Coaches:* Invite your client to complete it and then use it to enhance your ongoing coaching relationship.

LAST WORDS

Peter Drucker said it best: *Follow effective action with quiet reflection. From quiet reflection will come even more effective action.*

INDIVIDUAL
YEAR END ASSESSMENT AND PLANNING TOOL
PART ONE: MY YEAR IN REVIEW

- My top accomplishments, successes or highpoints for 2014:
- What enabled me to accomplish what I did:
- My discoveries, surprises, insights or key learning:
- What I'm grateful for:
- Those I want to thank or acknowledge:
- My disappointments, regrets, struggles:
- Priorities I didn't complete and wish I had:

PART TWO: MY GOALS FOR THE YEAR 2015:

- What I will create or accomplish this year (be realistic):
- What's important about these? Why these and not others:
- What could get in the way of me doing what I described above:
- In order to accomplish what I described above, I will:
 - *start doing (say yes to)*
 - *stop doing (say no to)*
 - *continue doing*
- Relationships I will nurture:
- What I need to ensure my success:
- (E.g. resources, support, self-care, professional, etc.)
- Specific next steps given what I have described above:

TEAM
YEAR END ASSESSMENT AND PLANNING TOOL
PART ONE: OUR YEAR IN REVIEW

- Our most important team accomplishments in 2014:
- Our positive impact: (e.g. on staff, customers, the organization)
- What enabled us to accomplish what we did:
- What we learned about being an effective team:
- Those we want to thank or acknowledge:
- Our disappointments, regrets or what we struggled with:
- Priorities we didn't complete and wish we had:

PART TWO: OUR GOALS FOR THE YEAR 2015:

- What we want to accomplish together (our team goals):
- What's important about this? (Why these and not others?)
- What could get in the way of our success?
- In order to accomplish our goals and enhance our team effectiveness we will:
 - *start doing (say yes to)*
 - *stop doing (say no to)* ○
 - continue doing*
- Relationships we will nurture:
- What we need to ensure our success: (E.g. resources, support, training, operating agreements)
- How we will review and evaluate our progress:
- Specific next steps given what we have identified: