



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

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*"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 then use the information gleaned to inform your thinking about what is next. Use this tool for yearly reflection and planning as part of a frequentative process: Plan, Act, and Reflect.

### REASONS TO REFLECT BEFORE TAKING ACTION

1. Reflection provides information that informs our thinking and actions.
2. Reflection increases individual and group awareness, a key leadership and life skill.
3. Reflection is a key component of personal and professional development.
4. Reflection enables a group to learn from their shared experience.
5. Reflection builds group alignment around what is important.

### MAKE REFLECTION A ROUTINE PRACTICE: USE THE TOOL EACH YEAR INDIVIDUALLY AND WITH A GROUP:

- *As an individual:* Complete the assessment yourself and use it to inform your planning.
- *As a supervisor:* Ask your direct reports to prepare responses to the Year End Assessment prior to meeting with you. The information is used to identify their individual goals for 2013 and specific support they need to be successful in their role. Use this tool each year to make reflection and planning an ongoing process.
- *As a team leader:* 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.
- *As a coach:* invite your client to complete it and then use it to enhance your ongoing coaching relationship.

### Hard won wisdom: What we've learned:

- Time spent on reflection will provide rich information for decision making.
- Plan, Act, Reflect is a powerful process for both individuals and teams.
- Peter Drucker (author and business consultant) 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

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- My top accomplishments, successes or highpoints for 2012:
- What enabled me to accomplish what I did:
- My discoveries, surprises, insights or key learnings:
- What I'm grateful for:
- Those I want to thank or acknowledge:
- My disappointments, regrets or what I struggled with:
- Priorities I didn't complete and wish I had:

### PART TWO: MY GOALS FOR THE YEAR:

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- 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

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- Our most important team accomplishments:
- 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:

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- 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 doing what we described above?
- 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: