

Collaborative Goal Setting

When a rabbi signs a contract with an organization it is a covenant, a *brit*, between two parties. Serving a community is a sacred responsibility. The pact is an agreement about our commitments to one another.

So, too, the evaluation of the rabbi's performance should reflect mutually agreed-upon goals and collaborative work toward the achievement of those goals. When organizations assess their leaders within the framework of the organization's overall effectiveness, all parties will be able to celebrate success and identify areas for improvement in a manner that is both respectful and holy.

The first step in this critical process is to have clear, agreed upon goals and desired outcomes in place so the organization and leadership agree upon what they are hoping to accomplish. Setting goals is a non-judgmental way to assess learning and growth for both individuals and organizations.

Inspired by this covenantal tradition, a P.A.C.T. Goal provides clergy, professionals, and lay leaders with a vital tool to honor their commitments by crafting goals so that they serve their organization's Strategic purpose. P.A.C.T. stands for Purpose, Action, Capacity and Time.

Creating Goals: P.A.C.T.

Purpose: How does this goal help address our mission and vision? Our mission and vision statements explain what we are here to do but also why the mission matters, the purpose behind our actions. A purpose-driven goal advances our mission.

Action: Peter Drucker once said that "management's job is to turn their mission into specifics." Leaders need to turn the mission into detailed plans of what actions are needed to achieve our goals and actualize our shared vision. Creating a spiritual home is a mission that should inspire action, but by itself it does not constitute a goal. A goal takes the vision of increasing a member's experience of spiritual connection and translates it into action.

Capacity: Do we have the people, resources, and energy to complete this goal? Leaders work best with realistic goals that challenge them to stretch but that are within reach. When goals are unrealistic, we may not believe they are worth taking on. This can become a self-fulfilling prophecy. "We tried this and it did not work. It won't work now." We need to know **who** will work on this goal and **what resources** they will need.

Time: What is the time frame to achieve this goal? One of the most vital elements of goal setting is creating a time frame for projects and initiatives. Realistic timelines generate urgency and purpose in our work and enhance our culture.

When setting goals, it is important to keep the organization's intended functions and prioritized services in mind. These may change over time, and an organization's goals should change as the functions and services change. Some examples of these are: pastoral care, education, administration, social activism, visionary leadership, strengthening community and one's sense of belonging, worship, spiritual guidance, financial resource development and scholarship.

Ideally, goals are set or clarified within the first few months of an individual's tenure, and desired outcomes are re-evaluated each year. If an organization recently completed a strategic plan or other goal-setting process, their goals may already be formed. Make sure they are clear to all parties. There is a [worksheet on the final page](#) of this PDF so that you can create P.A.C.T. Goals for your organization.

A Mutual Review Team should be created to set goals, assess progress each year, and re-evaluate for the next year. The Mutual Review Team should be comprised of three or four people who represent the diverse constituents of the organization and are jointly agreed-upon by the rabbi and the organization. This team should include the individual's direct supervisor, and all members should have specific knowledge of the individual's work. The evaluators should and can reach out to other senior and professional staff to gather feedback to inform their work. While evaluators will not be assessing individuals until a full year of service, we advise that everyone review the Collaborative Leadership Assessment now, as it may help guide the goal setting process.

Once P.A.C.T. Goals are created and clarified, review them with all stakeholders including the executive committee, senior staff, board, clergy, and president. Make sure all parties agree before sharing with the Mutual Review Team to clarify lay/staff accountability.

Setting goals is the first step in a mutual assessment process. When you are setting goals, pause and think about what success will look like. Remember to set aside time in one year to continue with the second piece of the Collaborative Leadership Assessment annual review.

P.A.C.T. Goal Example:

An example of a weak goal is “engage young families.” It does not let us know by how much, by what time, and for what reason.

P.A.C.T. Goals address the essentials of an objective and create a realistic, purpose-driven pathway to success. Here is an example:

My P.A.C.T. Goal is: Create and implement a monthly family service with 20 families in attendance.	
P.A.C.T. Goal Elements	Example of a P.A.C.T. Goal
Purpose: Why are we doing this?	Membership outreach and family engagement are major priorities. We believe one great way to engage community is to create a service specifically for families.
Action: What actions are needed to achieve this goal?	We will promote this new service at our main Shabbat services, as well as advertise it to our religious school and nursery school families. We will also reach out to the nearby commuter-university and see about posting on the family housing bulletin. Our goal is to reach 20 families monthly.
Capacity: Who will be responsible? What skills and resources are needed to make this goal happen?	The rabbi and ritual director will work together to create an engaging and meaningful new service. The board will set aside extra funds - \$500 – to cover the modest expense for a family kiddush and interactive activity.
Time: What is the time frame to achieve this goal?	We will propose this plan at the board meeting next month. We will begin the service in the Spring, and schedule it for every second Friday of the month.

Timeline:

One month after a new individual begins their position, the organization should form a Mutual Review Team. If the individual is already employed and you are newly implementing this process, create a Mutual Review Team as soon as you begin the process. This team will create and/or review short-term and long-term P.A.C.T. Goals and identify the organization’s priority functional areas. Some of these existing organizational goals may have already been enumerated in the job description and job posting. **One year after** the individual has been in their position, and annually thereafter, each member of the Mutual Review Team should complete the Collaborative Leadership Assessment and fill out the three parts - the Assessment, the Core Leadership Skills and Competencies, and the Organizational Achievement in Functional Areas. Once complete, the Mutual Review Team should meet to review the results of the assessment. At this point, the team should also review the previous year’s P.A.C.T. goals. Goals and plans should be assessed and adjusted for the new year’s goals. This process (assessment, review assessment, reassess, adjust, and clarify goals) should be repeated every year.

Organizational Key Functional Areas

The impact and effectiveness of organizations can be assessed by evaluating the core functions within the system and the services provided across the organization and to the larger community. You will be assessing your organization based on your individual priority key functional areas in Section 3 of the Collaborative Leadership Assessment.

Organizations are a composite of many tasks and responsibilities. There are times when one or another area of responsibility will take precedence, and there are certain functions that predominate either because they reflect the individuals' strengths or because they are at the center of the organization's mission or culture. Please review the list of roles and identify your organization's priority key functions. Think about:

1. Which functions are most important for your organization at this time?
2. Which roles are most important for your clergy, professionals, and lay leaders to perform exceptionally well?

Organizational Functions and Services Provided (suggestions):

- Pastoral Care
- Education
- Administration
- Social Activism
- Visionary Leadership
- Scholarship
- Strengthening Community and One's Sense of Belonging
- Worship
- Spiritual Guidance
- Financial Resource Development
- Professional Workplace Culture

Worksheet

Print this and use it as many times as you wish, one for each goal.

My P.A.C.T. Goal is...			
P	Purpose	Why are we doing this?	
A	Action	What actions are needed to achieve this goal?	
C	Capacity	Who will be responsible? What skills and resources are needed to make this goal happen?	
T	Time	What is the time frame to achieve this goal?	