

Collaborative Goal Setting

STEP 1: Create a team to set goals, assess progress each year, and re-evaluate for the next year. This team should be comprised of both professional and lay leadership who represent the diverse constituents of the organization.

STEP 2: Set clear and collaborative goals that the lay and professional leadership agree are the objectives your organization hopes to accomplish. We call these PACT goals because a “pact” or *brit* is an agreement about our commitments to one another. Once each PACT goal is created, review it with everyone who has a role to play.

PACT Goals

Purpose: How does this goal help address our mission and vision? **A purpose-driven goal advances our mission.** For example: We dream of providing people with a spiritual home.

Action: This is the **detailed plan** of what actions are needed to achieve our goals and to actualize our shared vision. A goal takes the vision of providing people with a spiritual home and translates it into action. For example: Develop three new alternative services in the following year. We can plan the events and we can track the results. **An action goal is specific and trackable.**

Capacity: Do we have the people, resources, and energy to complete this goal? We need to know **who** will work on this goal and **what resources** they will need. For example: The clergy will work on creating the service and the committee members will work on publicity, budget, food and other logistics.

Time: What is the time frame to achieve this goal? Realistic timelines generate urgency and purpose in our work and enhance our culture. For example: in November, March and May.

PACT 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.

PACT goals address the essentials of an objective and create a realistic, purpose-driven pathway to success. Here is an example:

PACT Goal: Create and implement a monthly family service with 20 families in attendance.	
PACT Goal Elements	Example
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?	- Promote this new service at our main Shabbat services - Advertise it to our religious school and nursery school families and the general community - Create the service - Integrate into the curriculum - Create a budget for the additional expenses
Capacity: Who will be responsible? What skills and resources are needed to make this goal happen?	- The clergy will promote at existing services - The communications/marketing committee will promote and advertise - The clergy will work together to create an engaging and meaningful new service - The educators will integrate this into the curriculum - The board will set aside extra funds
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 April, and schedule it once a month thereafter

STEP 3: Prioritize the PACT goals. Consider every element of the goal – from your “why” (Purpose) to your “what” (Action). Consider your “how” (Capacity) and your “when” (Time).

STEP 4: Get started! Work together, have fun, and make meaningful advances in your mission.

STEP 5: Evaluate your collective progress toward achieving the goals. Use your PACT goal worksheet as a tool to assess, update, and reprioritize.

STEP 6: Create new goals based on learnings from initial goals.

Worksheet

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

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?	

Collaborative Assessment

STEP 1: Complete the below assessment for each of the individuals on your team – professional and lay leaders alike.

- Individuals should also assess themselves.
- Each statement in the assessment is on a scale. Comments, such as praise or areas to improve are encouraged. If there is a specific example of success, please include it.
- Giving or receiving perfect ratings may feel good but is not helpful or appropriate for an assessment. The rating scale is not about being nice, but rather is a tool for genuine and constructive feedback to help individuals and organizations learn, grow, and improve.

STEP 2: Schedule a discussion to review the results. Practice active listening.

STEP 3: Participants are responsible for keeping physical or electronic records of their assessment.

Name: _____ Position: _____

Assessed by: _____ Assessment date: _____

This individual's actions contribute to our community's success.				
1 Strongly Disagree	2	3	4	5 Strongly Agree
Comments:				

This individual functions as a team player.				
1 Strongly Disagree	2	3	4	5 Strongly Agree
Comments:				

This individual has a positive impact on morale across the organization.				
1 Strongly Disagree	2	3	4	5 Strongly Agree
Comments:				

This individual offers constructive feedback to other leaders within the organization.				
1 Strongly Disagree	2	3	4	5 Strongly Agree
Comments:				

This individual initiates discussions to resolve conflicts.

1 Strongly Disagree	2	3	4	5 Strongly Agree
Comments:				

This individual is committed to working in innovative ways to meet the organization's goals.

1 Strongly Disagree	2	3	4	5 Strongly Agree
Comments:				

This individual is approachable and accessible.

1 Strongly Disagree	2	3	4	5 Strongly Agree
Comments:				

This individual carries out all responsibilities in an ethical manner.

1 Strongly Disagree	2	3	4	5 Strongly Agree
Comments:				

This individual leads with confidence.

1 Strongly Disagree	2	3	4	5 Strongly Agree
Comments:				

This individual is an active listener.

1 Strongly Disagree	2	3	4	5 Strongly Agree
Comments:				