

LIFEWISE ACADEMY



LIFEWISE LEADERSHIP BOARD ANNUAL GOAL-SETTING GUIDELINES

Prior to Goal-Setting Meeting

- ◆ Invite Leadership Board members to a 60-minute Annual Goal-Setting meeting
- ◆ Send the [Big Picture Packet](#) and ask Board members to review it prior to meeting

During Meeting

- ◆ Assign a note-taker to document the meeting
- ◆ Consider using a whiteboard in addition to personal notes so all Board members can see goals throughout the meeting
- ◆ Complete the attached Goal-Setting Worksheet out loud as a group
- ◆ Stick to the timeline provided on the worksheet to avoid “marathon” planning meeting

After Meeting

- ◆ Send meeting notes to Board members
- ◆ Add quarterly rock check-up to all future Board meeting agendas. Board members provide updates on quarterly rocks at each meeting and revise/update rocks at the end of each quarter.
- ◆ Repeat Goal-Setting meeting annually

Note on Using the 5 L's in Goal-Setting

It is helpful to consider the 5 L's of LifeWise in developing long-term goals. Here are some questions to ask as you go through the process:

- ◆ **Leadership:** How should our Leadership Board, staff and volunteer team look for the long haul?
- ◆ **Location:** What is the ideal location for our LifeWise program?
- ◆ **Logistics:** What enrollment goal are we striving to achieve? Can we expand within our community and to neighboring communities?
- ◆ **Loot:** What percentage of our budget should come from recurring donations? What fund balance should be kept in reserve at all times? What are our goals for our investment fund?
- ◆ **Language:** What is our ideal rhythm of communication with the community, donors and parents?

GOAL-SETTING WORKSHEET

Open with Prayer and Big Picture Review (10 min)

Review key components of the Big Picture Packet aloud:

- ◆ **Why?** (Statement of Faith)
- ◆ **What?** (Vision Statement and Philosophy)
- ◆ **Who?** (Core Values)
- ◆ **How?** (The Five L's of Operations)
- ◆ **Huh?** (Brand Messaging)
- ◆ **Where?** (History)

Review (or establish) 5-Year Goals (10 min)

Talk through Leadership, Location, Logistics, Loot and Language to identify goals, asking the question, "What do we want this program to look like in five years?"

- ◆
- ◆
- ◆
- ◆
- ◆

Review Previous Year's 1-Year Goals (5 min)

Mark each goal with its completion percentage:

- ◆
- ◆
- ◆
- ◆
- ◆

Create New 1-Year Goals (10 min)

Identify what needs to happen in the next year in order to achieve the 5-year goals:

- ◆
- ◆
- ◆
- ◆
- ◆

Quarterly Rocks (10 min)

Identify what needs to happen this quarter in order to achieve the 1-year goals. Assign each quarterly rock to a Board member who will “own” that rock.

- ◆
- ◆
- ◆
- ◆
- ◆

Issues (5 min)

List current issues that need to be addressed:

- ◆
- ◆
- ◆
- ◆
- ◆

To-Do List (5 min)

List action items to be tackled. Assign each to-do item to a Board member for completion.

- ◆
- ◆
- ◆
- ◆
- ◆

Conclude with Prayer

GOAL-SETTING WORKSHEET (EXAMPLE)

Open with Prayer and Big Picture Review (10 min)

Review key components of the Big Picture Packet aloud:

- ◆ **Why?** (Statement of Faith)
- ◆ **What?** (Vision Statement and Philosophy)
- ◆ **Who?** (Core Values)
- ◆ **How?** (The Five L's of Operations)
- ◆ **Huh?** (Brand Messaging)
- ◆ **Where?** (History)

Review (or establish) 5-Year Goals (10 min)

Talk through Leadership, Location, Logistics, Loot and Language to identify goals:

- ◆ 75% enrollment at elementary school
- ◆ Expand to middle school and high school
- ◆ Partnership created with all local churches
- ◆ Expand to three nearby communities
- ◆ Build permanent LifeWise site
- ◆ Annual budget fully funded by pledged/recurring donations
- ◆ 20K in endowment fund

Review Previous Year's 1-Year Goals (5 min)

Mark each goal with its completion percentage:

- ◆ 60% enrollment at elementary school (100% complete)
- ◆ Send expansion proposal to middle school (100% complete)
- ◆ Create partnership with 50% of local churches (75% complete)
- ◆ Help establish LifeWise Steering Committee in Podunk, OH (100% complete)
- ◆ Purchase land for permanent site (50% complete)
- ◆ Annual budget 50% funded by pledged/recurring donations (80% complete)

Create New 1-Year Goals (10 min)

Identify what needs to happen in the next year in order to achieve the 5-year goals:

- ◆ 65% enrollment at elementary school
- ◆ Secure location and transportation for middle school site
- ◆ Create partnership with 70% of local churches
- ◆ Help establish LifeWise Steering Committee in Somewhere, OH
- ◆ Raise another \$100,000 toward building project
- ◆ Annual budget 60% funded by pledged/recurring donations

Quarterly Rocks (10 min)

Identify what needs to happen this quarter in order to achieve the 1-year goals. Assign each quarterly rock to a Board member who will “own” that rock.

- ◆ Noah – Increase enrollment through “invite a friend” campaign
- ◆ Fred – Draft middle school expansion proposal
- ◆ Sally – Meet with six churches
- ◆ Rachel – Invite contingencies from two nearby communities to 101 events
- ◆ Kate – Meet with real estate agent to research available properties
- ◆ Micah – Schedule fundraising banquet

Issues (5 min)

List current issues that need to be addressed:

- ◆ Class size too large for current classroom
- ◆ Need more volunteers

To-Do List (5 min)

List action items to be tackled. Assign each to-do item to a Board member for completion.

- ◆ Fred – Meet with pastors of X, Y and Z church to schedule presentation – seeking funds and volunteers (Initials here)

Conclude with Prayer