

Annual Reflection

2021 - 2022

The annual review is an opportunity for you to consider the last 365 calendar days and look forward to the next 365. Create space to pause from daily tasks and “zoom out” to how your role is going. The goal of this exercise is to provide the board of directors with input on how to care for you well, and allow a specific space to process long-term goals or longstanding challenges. You can type answers before we meet in person, or simply think about them and discuss in person. I will also provide feedback for you.

Personal

What have you learned?

Negotiating salaries (Taylor's promotion)

Letting go and trusting leaders: gala, development director transition

What would you like to learn more about?

How to create a legislative bill

Providing feedback to staff: positive and areas for growth

Economics

Logistics

What do you feel you accomplished? What is something that you are proud of in your work?

Building capacity to hire Taylor. Transitioning DD role and responsibilities to her.

Launching OLP, improving it and learning how to use it

Staff care & retention

What is your favorite part of your job?

Leading live training

Least favorite part?

Human resources (setting up IRA, launching new payroll system, reviewing staff handbook, hiring and firing):

This is important, but it is time consuming and unfamiliar to me.

What is a strength you possess that you don't get to use often at SHAN?

Communications: website design, print layout and design, video production

Public speaking for live audiences

A weakness that you would like to delegate, grow in or give up?

HR (see above)

What are your professional goals and needs for the coming year? How can we help you work towards that?

Retake personality tests (Meyers Briggs, DISC, etc. What do the results say about my leadership style?

Find a conference to replace Acton University (mentally stimulating, not necessarily related to the cause

Reconnect with and shadow my counterparts at partner agencies (FALC, OOD, 1DL2H)

Shadow similar leaders in other causes and the marketplace

Review and refine my responsibilities: Is my job description still accurate? Where are there gaps among other staff that I could fill? What is something I've dreamed of doing but didn't have capacity as DD/ED?

Courtney Schmackers
10.19.2022 with Hannah Park

What can we do as the board to make you successful in your role? How can we serve you better in the next year?

Continue to refine the ED and board relationship: How can I speak and lead less among this group so that you can all live out your giftings? What structure or process still needs to be developed so that you can operate?

Organizational

Any thoughts or feedback on what is going well at She Has A Name?

Fundraising/financial development: should have promoted Taylor sooner!

4 happy, long-time staff

Counseling

What could have gone better?

Transition plan for education pillar: assess what we currently offer, collect data from past events and key stakeholders, plan/strategize and test before making final decisions

Reassess staff roles and responsibilities: Who owns what and why? What could be delegated to a volunteer?

Comm plan for no gala/planning new event

Providing feedback for staff

Strategic Planning process: Utilize board strengths beyond relying solely on Yiping

Scholarship recipient follow up

Anything you see us doing that we should give up?

New ideas for something we haven't considered yet or have underdeveloped?

Legislative advocacy: What does this mean per our strategic plan and programming? Utilizing 5-25% of resources per IRS guidelines

Adding contacts/resources for Dream Scholarship recipients

Metrics! Uniformly identify, capture and share across all programs, not just when a particular grant report asks for them.

Board development: finding balance between volunteer management and fostering a self-lead group. "Activate" individual members per their strengths and interests (MIF workshop had more ideas)

Media interviews: Podcasts, social influencers, blogs. How can we be proactively sharing through existing networks outside our own channels?

Proactively pitching training to target demographics in need

Monetizing training for corporations

Strategic plan refresh: Annual, short timeline, include all board members with those skills.

CORRC: involvement or critical assessment

Any other thoughts, comments, or feedback.

Hannah's input from here

Staff response on Courtney's strengths and opportunities

- She's professional and effective.
- She's a great communicator to honor differences in how she'll need to communicate to which audience. She's a great public speaker.
- She's cultivated a great culture among staff.
- She's grown so much in empathy and grace, especially for herself.
- She's optimistic and flexible.
- Opportunities: increase relationships with survivors more. How things are communicated to each staff and perhaps needing more alignment. Let the staff know how she can be supported.

Staff response on SHAN staff strengths and opportunities:

- SHAN is pretty amazing for what it can do for it's size. There's so much grace and encouragement.
- So much understanding and flexibility
- We are agile - willing to try new things
- We are able to problem solve in fun ways.
- Opportunities: we can be pretty siloed and lack clarity in our role. sometimes lacking focus to do a few things with excellence.

My comments:

- I only know Courtney from a monthly meeting perspective but I saw so much growth in compassion, ability to relate to people and connect with people.
- Thank you for making the effort to come out to apple picking and engage with others. I know how difficult it is for introverts.
- Thank you for making the effort to follow up on my request for more public speaking opportunities
- You did an excellent job filling in during the interim period and the difficulties of the board member issue.
- You are an excellent public speaker and I was very impressed with the way you presented SHAN during the NW broadcasts. I encourage you to continue working on that.