THE ORGANIZATIONAL PULSE

Part 3: Reflection & Learning Check-In

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A short reflection on the year that was, what it taught us, and what you might carry forward. Take a little time on your own, or use these questions to start a conversation with colleagues. Check what resonates and add a few words about your organization's experience.

1 Take Stock: What defined this year?

Where did You Make Meaningful Progress?

Check what stands out, and briefly describe what it looked like or how it affected your organization.

- ☐ Completed important projects or advanced priorities
- ☐ Improved programs, services, or outcomes
- ☐ Made clearer decisions or strengthened direction
- ☐ Strengthened people, teams, or organizational capacity
- ☐ Built stronger community relationships or partnerships
- ☐ Sustained important work through difficult circumstances
- ☐ Other:

What Challenges/Pressures Shaped the Year?

- ☐ Financial or resource constraints
- ☐ Growing or changing community needs
- ☐ Staff capacity, workload, or transitions
- ☐ Changes in the external environment
- ☐ Difficulties coordinating or sustaining progress
- ☐ Competing priorities or difficult trade-offs
- ☐ Other:

If you were to give this year a headline for your organization, what would it be?

2 **Make Sense:** What did the year teach you?

What accomplishment or progress are you most pleased with? What helped make it possible?

Many nonprofits are responding to increasingly complex community needs while navigating funding uncertainty and stretched capacity. Some challenges are well beyond an organization's control.

Looking back, where did you face the greatest difficulties or trade-offs? What, if anything, might those experiences help you understand about your organization or its circumstances?

What's one important thing you've learned about your organization's strengths, capabilities, relationships, or ways of working?

3 **Carry Forward:** What might be worth building on?

What strengths, relationships, resources, or learning would you like to carry into next year?

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Thinking about what you've learned, where do you see opportunities to build on your organization's strengths, extend its progress, or explore new possibilities?
Consider the following areas of organizational development. Check those that resonate and jot down the particular opportunities you have in mind.

- ☐ Shaping the next chapter of our strategic direction and priorities
- ☐ Exploring the public value we create, for whom, and how we might strengthen it
- ☐ Keeping our strategy active through shared learning, tracking, and adjustment
- ☐ Using what we have learned to shape and improve programs and services
- ☐ Building on the strengths of our people, culture, and ways of working
- ☐ Learning more about our services, people's experiences, and the outcomes we're achieving
- ☐ Deepening collaboration and what we can accomplish with partners
- ☐ Aligning community investments and resources with priorities and desired outcomes
- ☐ Learning with communities and bringing their perspectives into decisions
- ☐ Strengthening our contribution to broader community outcomes and impact
- ☐ Other: _____

Of the opportunities you have identified, which one or two stand out as particularly worth exploring in the year ahead?

What's one question you'd like to bring into your thinking about next year?

Would it be helpful to talk this through?
If a coffee or conversation about what you're noticing and what might help would be useful, we'd be glad to connect.

makeit@doable.ca | doable.ca *We're on your side.*

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