

WINTER 2013 NEWSLETTER AND UPDATES

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The Annual SMART EARL Visit

The new year usually brings a new visit from **SMART EARL** for most organizations. This is the time to evaluate past performance (EARL) while setting new objectives for the new year (SMART). It's the time to ask:

- How am I doing?
- What did I accomplish last year?
- What is the focus for this year?
- What will be my expected priorities for this year?



When reviewing the past year, keep in mind **EARL**:

Expected--identified what was expected to occur, agreements on objectives and goals for the past year

Actual--what was the actual performance related to the expectations

Results--because of the actual performance, what are the results (positive, negative, neutral), what are the measurements

Learn--what was learned about skills, ability, and knowledge related to the expectations and how does this apply to future expectations

This simple framework provides a tool to focus the performance discussion while also linking past performance to future objectives.

When planning and setting objectives for the new year, keep them SMART:

Specific--language should be clear, concise, and understandable; use action verbs

Measurable--you should be able to measure successful completion

Aligned--individual objectives should be aligned to departmental and organizational objectives thus creating line-of-sight for everyone; the objectives are relevant to the organization

Realistic--the objectives can be accomplished reasonably within the expectations

Timely--there is a time measurement associated with each

Yet, to stop at **SMART** is simply not enough. Once written, the objectives should be prioritized. Doing so clarifies their relative importance and provides a framework for each person to prioritize their ongoing work.

And remember, objectives should be reviewed periodically for completion, relevance, and clarification (perhaps changing the scope or prioritization). How often this is done is dependent on the experience of the individual as well as the 'natural rhythm' of your organization. By that I mean, some organizations and industries have natural times for reviewing progress--end of a project, semester, major event, etc.

As you're planning for your annual SMART EARL visit, let us know how we can help. We have programs and tools to assist as well as the ability to coach you and your organization on establishing a good relationship with **SMART EARL**.

Your organization may also want to consider using a web-based performance management system. We've had great experience in helping organizations select, install, and train on such systems. Give us a call at 214-801-2708.

Our session in January on setting goals was well-received. If you'd like to schedule a session for your organization, just contact us for dates, costs, and content.

2012 Thanks and Giving Luncheon and 10th Anniversary Celebration

On November 16, we hosted a special event--Our Annual Thanks and Giving Luncheon. It was held at Lawry's The Prime Rib in Dallas. This year it was made even more special because we celebrated our 10th Anniversary!



We were honored to have so many of our clients--current and past--attend. Clients included our first client (Collin College) to our most recent client (PATH)--with a whole host of wonderful organizations. Thanks for all who attended!

At the luncheon, David shared a few stories from the past decade that he fondly recalls with a chuckle:

- *Telling people to "grab their seat of someone else's seat" after a break--and, yes, you can guess what happened...people more than snickered at this comment.*
- *Working with Cirque and telling them to stretch their legs--and learning that when you tell gymnasts to do this, well they can stretch their legs in ways that most of us can not.*
- *Culinary Teambuilding with CoreLogic last year--biggest group ever and they really responded quite well (although we may have set a new record on late clean-up).*
- *Working with Center for Jewish Education on a new program and when asked which synagogue I attended, I responded with "St. Monica". The Rabbi laughed and said "good, you have no dog in the hunt".*
- *Losing his voice completely just 3 days before a major program roll-out with LSG Sky Chefs--not knowing if it would come back in time (it did) and being told to be quiet by the client (while they laughed).*

The highlight of the luncheon was our annual opportunity to say "Thanks" to our clients for the past year (and since it was our anniversary we invited all past clients) and for us to "Give" to several charities. This tradition is now 9 years old and we look forward to the 2013 lunch.

This year the charities were chosen with the input of the clients. Clients could both nominate and then vote on the charities. And because it was our 10th Anniversary, we doubled the number of charities selected and donations granted. Those honored included:



Ann and Nate Levine Academy-- Levine Academy is about education and about teaching our students to become caring and compassionate people who will make a difference in tomorrow's world. In preparing students for such a journey, the school and all of its teachings rest on a solid foundation of Inspiration, Knowledge, and Character. For more information, go to www.levineacademy.org.

Blondes vs. Brunettes Tackling Alzheimer's--Blondes vs. Brunettes Dallas is a powder-puff football game hosted for a day of fun, fellowship, philanthropy and enjoyment as a way of raising money for the Alzheimer's Association of Greater Dallas. BvB is a personal way for young professionals across the country to raise awareness and donations to help eradicate this grave disease. This was a banner year for BvB as they crossed the Million Dollar Mark in just 5 years. Their leadership and dedication is their hallmark for success. Check them out at www.bvbdallas.org.

PATH (People Attempting to Help)-- PATH's mission is to serve, through well-equipped volunteers, the economically disadvantaged people in Smith County with both emergency assistance and programs to empower and encourage them to become self-sufficient. They offer a wide-range of services and programs. Learn more about them at www.pathhelps.org.

SPCA of Texas--The Society for the Prevention of Cruelty to Animals of Texas (SPCA of Texas) is the leading animal welfare agency in North Texas with two shelters and two spay/neuter clinics located in Dallas and McKinney, and serves as an active resource center providing an array of programs and services that bring people and animals together to enrich each others' lives. Learn more about them at www.sPCA.org.

The Women's Chorus of Dallas-- The Women's Chorus of Dallas promotes the strength, diversity and joy of women by performing high quality music to entertain, inspire and serve the community. The vision of The Women's Chorus of Dallas is to be a recognized choral group providing musical excellence and contributing to the community in a positive manner through entertainment and the support of women's causes. Learn more about them at www.thewomenschorusofdallas.com/.

Shoes for Orphan Souls-- a ministry of Buckner International, it has distributed more than 2 million pairs of new shoes to vulnerable children in the United States and to orphans in 74 countries around the world. Each pair of shoes represents a child's self esteem, a child's health or a child's access to an education. Learn more about them at www.buckner.org.

Special Needs Partnership of Jewish Family Services of Dallas-- The Special Needs Partnership was founded by a group of local families to advocate more strongly on behalf of their special needs children. The partnership is a grass-roots initiative that furthers awareness and inclusion through education and support for individuals and families through community programming. Learn more about them at www.jfsdallas.org.

And the voting was a tie for "People's Choice" this year! Recognized as such:

**SPCA of Texas
Shoes for Orphan Souls
Special Needs Partnership of Jewish Family Services of Dallas**

In addition to these donations, David and Dynamic Growth Strategies made a pledge to Dallas CERT. Many of you know that David has been involved as a volunteer with the City of Dallas CERT program (Community Emergency Response Team). He is a volunteer responder and is working with a group of citizens to form a nonprofit for Dallas CERT so that they may purchase equipment, supplies, and training. He pledged a donation to this effort. To learn more about Dallas CERT, go to www.dallascert.com.



Award recipients (L to R): Gary Avery (PATH), Melinda Imthurn (The Women's Chorus of Dallas), David, Jackie Anchondo (SPCA), Mark Stolovitsky (Levine Academy), Steve Massey (Buckner). Not pictured are representatives from Blondes vs. Brunettes and Jewish Family Services.

Updates and Announcements

Our Annual Assessment Sale will be held during the month of February. All assessments will be 15% off. This includes:



DiSC®, Time Mastery, Team Dimensions, Group Development Assessment, and all of the 360-degree feedback assessments such as Benchmarks™, 363®, and Skillscope™. New this year: we've added several books.

To order, call 214-801-2708 or email david@dynamicgrowthstrategies.com.

DiSC Reach Back, Leap Forward 2012 2013 Migration Program has been extended into 2013. This successful program allows those who have taken Classic DiSC with Dynamic Growth Strategies in the past, to try a new Everything DiSC® assessment for **30% off** the normal cost! This program continues until the end of the year. Contact me if you're interested.

Beta Testers Needed for a team-based version of DiSC® focusing on innovation in teams. If you have such a team of 5 or more, contact me. **No cost** for the assessment, which includes a 3-hour debrief. Last year, 2 clients participated in this beta-testing and we're looking for others.

Schedule your culinary teambuilding session now. We continue to book dates for the year and look forward to a session with you. We've also designed a **new breakfast program** that can be delivered in a shorter timeframe and at a lower cost. Checkout our [Teamwork A La Carte website](#) for information on our popular culinary teambuilding programs and to schedule a program. And, yes, we can do very large groups! We've found another site in north Dallas that can accommodate more than 50 people (up to a hundred).

Consultants Luncheon is scheduled for Friday, February 22. Contact me at david@dynamicgrowthstrategies.com for information or go to our LinkedIn page: [North Texas Consultants](#).

The first Nonprofit Leader Lunch for 2013 will Friday, March 22. This is for executive directors, managers, and Board leaders. Contact me at david@dynamicgrowthstrategies.com for information.



Blog www.thinkchangedo.com postings these past few months included:

"A Checklist for 2013 Planning"

"Not the brightest crayon in the crayon box"