

## Session #5: Designing Key Objectives (Expression) Supplemental Handout

As we move forward from the Assessment Phase (Session #4) and into the Action-Oriented phases (Session #5 and Session #6) we should be designing our key objectives around feedback that we've received from internal and external stakeholders and key constituencies.

This is the action-oriented phase of your DEI mission, goals and initiatives. This supplemental handout offers different tools for beginning the planning process. Also, be aware that this could very well include specific objectives that target more time and development of the assessment phase. Do you need to find more time to connect with individuals, leaders and organizational partners? Is there a need for more communication around partnership roles and brainstorming opportunities with partners? Then, that could become a key objective to list in your plan.

The design of key objectives is centered on equal input from multiple parties, it is a shared consensus of what next steps should entail. It is important to remember that the objectives will begin to inform a projected timeline and specific goals within certain areas of the organization (i.e., social media/marketing, external partnerships, funding/development). It encourages input and collective ownership into the development of a plan and specific action steps.

This phase is all about Action-Planning (Expression) in our ["Practice of Positive Change: An Indigenous Approach"](#) framework. This supplemental handout supports the Work Group Action Planning Packet section, on Page 7, "Session #5: Key Objectives".

In the development of your key objectives, the aim is that you begin to have an increased understanding and awareness of others in mind as you design your key objectives. It may help to take note of those who contributed to the formation of certain key objectives, as you may want to go back to them and work with groups or individuals on specific outcomes of each objective.

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## Translating Feedback into Defined Action-Steps

In our last session, we encouraged you to reach out to current partners, community groups or individuals that your organization to offer insights and feedback on how your organization can improve and also key strengths. This next section offers some ideas on steps you can take to start to develop tangible next steps.

### 1. Check-In & Clarify Understanding

If you haven't done so in your meetings, be sure to follow-up with an e-mail or post-meeting conversations to check for areas of your review to refine, offer a chance to clarify your understanding and follow-up with next steps.

### 2. Get it in Writing

Develop and design a written report of your key outcomes and themes that you've developed from your individual and partner meetings. One way that this is most effective, is that you contain a written report and outline of themes. This can be a general summary report. General reports outline key themes and outcomes. Specific reports, usually for administrative level positions (like Human Resources) could contain more details to assist with internal support for guiding objectives.

### 3. Share It

Share your Summary Report with Key stakeholders, internal and external partners. This will assist with moving you forward and perhaps may invite more conversations and formal meetings around the development of key objectives as you move forward.

## Objectives/Key Performance Indicators/Metrics

Other terms such as "KPI" or Key Performance Indicators and Metrics. These all identify specific steps and measures that demonstrate progress towards a larger goal. What will your measures of success be? Recall in Session #2, our discussion and definition of goals versus objectives. To help you identify specific objectives it's useful to think of different areas of your organization and where you can integrate your key objectives. Note that key objectives, depending on what they are, can be implemented across divisions of your organization.

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## Re-Visiting Key Objectives

In [Session #3, Goal-Setting](#), we talked about the difference between goals & objectives. In this section, I will revisit the Indigenous Life mission, goal and objectives. Also included are other examples of how a non-profit might use feedback to support key objectives.

### SAMPLE CORE VALUES, MISSION, GOAL & OBJECTIVE

This is a sample of my (Kapi'olani's Indigenous Life Coaching & Consulting) goal setting exercise:

#### Core Values

##### Lifelong Learning

`Ike Pono, Knowledge & Understanding; Na`au - Following the heart when intellect ceases

##### Legacy-driven

Ho`omau, Perseverance ; Ha`aha`a, Humility

##### Respect & Reciprocity

Self, community & environment 'Aloha 'Aina

#### Mission Statement

To drive excellence and innovation in two-worlds through learning, health and improving overall quality of life for everyone, everywhere. Indigenous Life Coaching & Consulting strives to fulfill the promises made to our ancestors and grandchildren everyday.

#### Goal

To promote Indigenous knowledge and ways of life through stories and shared experiences.

#### Objectives

- Provide free virtual meetings two days a week for six weeks.
- Provide guest speakers with opportunity to share a charitable organization for participants to donate to, as an option of gifting.
- Provide guest speakers with audio and visual recordings to share with their network.
- Invite 11 scholars and leaders to share their experiences working in and with Indigenous and Communities of Color.
- Provide session materials and assist participants with outlining a strategy/plan for diversity initiatives in their organization.

- Next Page for *Assessment To Action* -

## Assessment to Action

How do you translate your assessment outcomes and themes into action-oriented steps? Here are some examples of feedback that one could receive and how to establish an objective around it.

### Using Feedback to Shape Key Objectives

Below I've used some of the objectives we used as examples on Page 3 of your [Session #3 Supplement Handout](#). Don't forget to keep the steps above (Checking In, Clarifying, Written Review/Recap of Feedback) at the forefront of your planning process.

**Feedback from a Community BIPOC/Two-Spirit Partnering Non-Profit:** *"We have a program that supports youth & young adult two-spirit BIPOC learning about traditional foods and medicines and invite two-spirit elders, but, we don't have a venue to host these workshops".*

#### New Key Objectives:

Community Engagement: Increase engagement in and support for "X" by offering our land space as a venue for workshops. Community Give-Back: Create opportunities for elders or communities to use land for harvesting traditional foods.

**Feedback from a Internal staff member "X":** *"I'm a non-BIPOC and responsible for social media messaging. I'm not sure what steps to take or if I'll offend someone. I'd like to have more professional development opportunities and training".*

**New Key Objective:** Marketing/Public Relations: Implement training sessions on Diversity and Messaging, develop and streamline process for authorizing messaging and increased support for social media staff to respond to public responses.

**Feedback from Internal Staff "X":** *"I along with the Board of Directors would like to support DEI efforts, though, we do not know where to direct our efforts. We'd like to have a good idea of where we are "at" now and key next steps we should take internally and externally."*

#### New Key Objective:

Funding & Development: Provide a written summary report of feedback for key leadership, board of directors and HR on our outcomes and themes from meetings with partners to assess progress, areas of improvement, opportunities to support organizations. Identify 3 next steps or recommendations.

- End Session #5 Supplemental Handout -

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