

# Annual Reflection and Planning Journal

Please visit Being in Community ([beingincommunity.com](http://beingincommunity.com)) for instructions on how to use this reflection and planning tool.

## Reflecting on the past year

"By three methods we may learn wisdom: First, by reflection, which is noblest; second, by imitation, which is the easiest; and third by experience, which is the bitterest." - Confucius

### **What are the roles I've played this past year?**

*Consider family roles, community roles, work roles. Remember to consider all the questions below in light of these different roles.*

### **What am I most thankful for this year?**

*Don't hold back – write down everything you are thankful for.*

### **What was my most enjoyable/pleasurable time last year?**

*Consider experiences you've had the past year; a vacation, a memorable date night, the party you had after finishing a race – any experience that made you feel happy.*

### **What are my major accomplishments this year?**

*Remember to consider all your roles. Not every accomplishment needs to be work or business related.*

### **How did I accomplish them?**

*Be specific – you will want to go back to this when you move on to planning.*

### **How did others help me accomplish them?**

*Accomplishments are rarely accomplished alone!*

### **What did I struggle most with this year?**

### **What has helped me deal with these struggles or overcome my obstacles?**

### **Who has helped me deal with these struggles or overcome my obstacles?**

### **What lessons did I learn last year? How did I learn them?**

### **What relationships have I started or strengthened this year?**

### **What relationships need more work?**

**What books, articles, webinars, podcasts, sermons, lectures, conversations, and/or conferences have I read, heard, or participated in this past year that have affected me, changed my attitudes and behaviors?** *There is no need to do any research. These should come to mind right away if they were impactful.*

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## Planning for the New Year

“Our power as individuals is multiplied when we gather together as families, teams, and communities with common goals.” — Susan Scott, *Fierce Leadership: A Bold Alternative to the Worst "Best" Practices of Business Today*

**What are the roles will I play this upcoming year?**

*Remember to consider all the questions below in light of these different roles.*

**What are my big ideas, goals, and dreams?**

*Don't hold back. Write down everything you want to do, even if it seems unrealistic at the moment. We will get real in the next few questions.*

**Which of these ideas, goals, or dreams do I want to start and/or accomplish this year?**

*This is where we get a little bit more realistic.*

**What is the community that I will work with to help me accomplish these ideas, goals, and dreams?** *Consider all the relationships and groups that will help you on this path. These are people that could be part of your team, who might provide support, hold you accountable, share resources, help with child care, etc.*

**What do I want to learn this year? How do I want to learn it?**

*Consider linking this to some of the goals mentioned above. Learning can take any form – mentorships, reading, online courses, webinars, conferences, support groups, apprenticeships, apps, classes.*

**What relationships do I want to strengthen/nurture this year? How will I do this?**

*Remember to consider all your roles here. Work relationships need to be nurtured in addition to personal relationships.*

**What habits do I want to build and/or maintain this year?**

**How am I going to build them? Who will help hold me accountable to those habits?**

**What obstacles do I foresee in the path of achieving my goals and/or building my habits? What will help me overcome them?**

**What do I want to stop doing this year?**

**What enjoyable experiences do I want to plan for/look forward to this year?**

**What word(s), quote, verse, or value would you name for this year?**

*Many productivity coaches like to choose a word (or a few words) to help them focus on during the year. After this goal and reflection exercise, consider such a word, or perhaps an inspirational quote, scriptural verse, or even a role model that would be emblematic of your goals this year.*