

## FOCUS AREA 1 ACTIVITY

# Creating SMARTIE Goals

Review how to create clear program goals using the SMARTIE framework.

## BACKGROUND

Having clear goals is a critical part of any program. They can help us identify:

- What we want to accomplish
- How we will measure it
- How we know if we succeeded

SMARTIE is an acronym to describe qualities that you can apply to goals to make sure they are useful and support your work. Review pages 1 and 2 in this document for suggestions on talking about SMARTIE goals with your team. Then, you can complete the group activity on page 3 to help team members get familiar with goal setting or jump to the worksheet on page 4 to start revising a goal.

## PREPARING FOR THE ACTIVITY

### Estimated time for this activity:

45-60 minutes

### You can tailor this activity to:

- Individuals
- Program teams
- Individual departments

*For small group discussion, aim for 2-4 people per group.*

### Activity objectives:

Team members will be able to:

- Identify 7 elements of SMARTIE goals
- Evaluate whether a goal meets SMARTIE criteria
- Practice adapting goals to the SMARTIE framework

### Items you may need:

- Examples of goals related to your work that showcase SMARTIE qualities
- Copy of any goals you would like to review or discuss
- Worksheet

# **ACTIVITY INSTRUCTIONS**

## **1. Introduce the concept of goal setting**

If everyone in the group is comfortable, ask everyone to identify a goal they have made for themselves. If you are unsure of the group dynamics, you can call on volunteers who feel comfortable sharing:

- About the goal and why it was important
- How they knew when they reached the goal

## **2. Explain the importance of having clear program goals or individual goals to support the success of the program.**

Be prepared to share the reasons important for YOUR program. Here are a few:

- To have clear ways to show funders we are achieving our goals
- To be able to know internally that we are serving our clients effectively
- To have a historical record of how the program has performed over time
- To identify if more resources or needed

## **3. Using the worksheet, review the elements of SMARTIE goals.**

Consider sharing examples of goals that showcase the different features.

## **4. Review the example on the bottom of page 3 as a group or in pairs.**

Example differences to discuss:

- The new way to measure the goal is more accurate and easier to track.
- The new goal considers that other forms of client contact allow CHWs to better accommodate clients.
- The new goal reiterates the reason for the goal - to provide client support.

Feel free to ask if there is anything else missing from the goal to explore further.

## **5. Address a department, program, or team goal to improve.**

Use the page 4 worksheet to identify a goal to improve. Or have team members work on goals particular to their area. Leave enough time to share back, ask questions, and identify next steps or additional information needed. Be sure to include next steps of how you will use the goal and any other changes needed.

# Reviewing SMARTIE Goals

Review the 7 parts of SMARTIE goals below. Then, think about the discussion questions.

<b>Strategic</b>	How does the goal fit with your mission and vision?
<b>Measureable</b>	Is the goal specific and concrete? How will you know that you reached it?
<b>Ambitious</b>	Is the goal meaningful? How does it advance your work?
<b>Realistic</b>	Is the goal doable? Can you reach it with your capacity and resources?
<b>Time Bound</b>	When should the goal be achieved? Is the timeline reasonable?
<b>Inclusive</b>	Was the goal developed with the people doing the work on the ground?
<b>Equitable</b>	Who is benefitting from achievement of the goal?

## Discussion Questions:



Marta is helping her boss review the goals of the community health worker program. Compare the old version of the goal with the new version. **What's different? How might these changes help the program and clients?**

### Original Goal

CHWs will have in-person contact with each client at least once a month while the client is enrolled in services.



### New Goal

95% of clients will have at least 1 monthly touchpoint while enrolled by method that best serves the client (email, text, video chat, or in-person) to ensure support needs are addressed during fiscal year 2027.

**How we will measure:** Manager will review CHW case note files each quarter.

**How we will measure:** CHWs will use secure internal system to document client contacts so that Manager can pull reports of % of touchpoints each month. Each referral will be noted to better quantify referrals by person, referral outcomes, and referral type.

# Making Your Goal A SMARTIE Goal

List a goal important to your role or your program in the space below. For that goal, review if it meets all the elements of a SMARTIE goal. Consider any ways you might strengthen the goal related to any elements where the answer was no.

**Original Goal:**

	Yes	No	If you answered no, what is missing?
<b>Strategic</b>			
<b>Measureable</b>			
<b>Ambitious</b>			
<b>Realistic</b>			
<b>Time Bound</b>			
<b>Inclusive</b>			
<b>Equitable</b>			

**Additional questions to consider:**

- Do we need to change any processes if we adapt the goal?
- Do we need to adjust how we track this goal?
- Do we need to check in with other staff to get more information before we update this goal?

**Revised Goal:**