"*To set and work toward any goal is an act of courage.*"

- Stephen Covey

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HSIAC National Conference

S.M.A.R.T. Goals Workshop

February 2, 2011
Presented by: Anne Conzemius

Quality Leadership By Design
The S.M.A.R.T. Way

Guidelines for Working Together

- Take care of your comfort.

- Start on time, stay on time, end on time.

- Pay attention to your "feathers"

- Respect the 100 Mile Rule

- Have fun

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Why are We Doing This?

Compliance

OR

Commitment

To Get Better Results!

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Reflections…

Think about a personal goal that you currently have OR a prior goal that you have already achieved in your life.

Personal Connections

Pair up or form triads to talk about what goals do for you at a personal level.

Personal Connections

- Give Direction
- Maintain Focus
- Help to Prioritize
- Motivate
- Keep Accountable
- Instill Hope
- Build Confidence

"Goal setting is a uniquely human exercise because it requires the ability to think beyond today into the unknown, to imagine the possibilities while discerning what's really possible and to put action to faith."

What is S.M.A.R.T.?

Specific & **S**trategic

Measurable

Attainable

Results-based

Time-bound

Why S.M.A.R.T. Goals Work

- Those who are responsible for achieving the goal are the ones responsible for creating the goal.

- Collaborative development of the goal assures shared understanding and commitment to achieving it.

- S.M.A.R.T. Goals are based on data and are monitored for impact on an ongoing basis.

Why S.M.A.R.T. Goals Work

- S.M.A.R.T. Goals can be applied and aligned at many different levels, creating a common language and system for goal management.

- S.M.A.R.T. Goals focus on the vital few priorities that bring the greatest impact overall.

S.M.A.R.T. Goals focus on the few things most likely to have the greatest impact.

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If you have dozens of priorities…

you have NO priorities.

Pareto Principle
80% of the trouble is caused by 20% of the problems
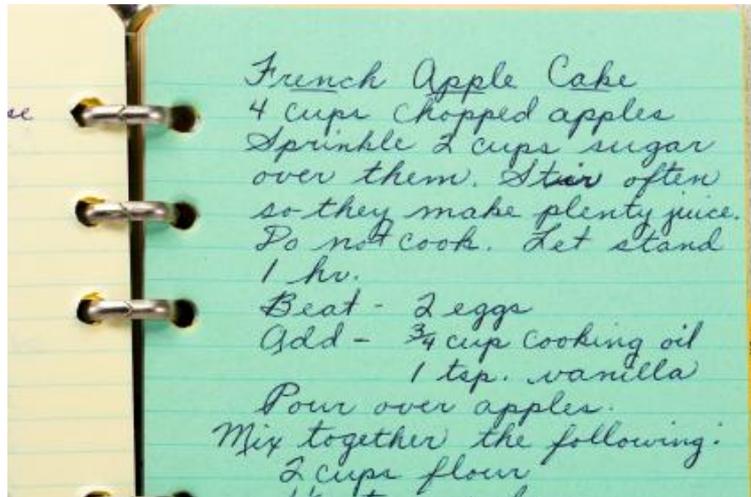
Used with permission from Oriel Inc.

S.M.A.R.T. Goals focus on results.

PROCESS   RESULT

Following a recipe

PROCESS GOAL

Expand outreach efforts to cover a broader geographic region.

RESULTS GOAL

Increase the number of individuals and families receiving our services.

RESULTS GOAL

Increase by 50% the number of appropriate new business start-ups in El Centro Histórico.

PROCESS GOAL

Develop a strategic plan for how we will support new businesses in El Centro Histórico.

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Process vs. Results
Goal Exercise

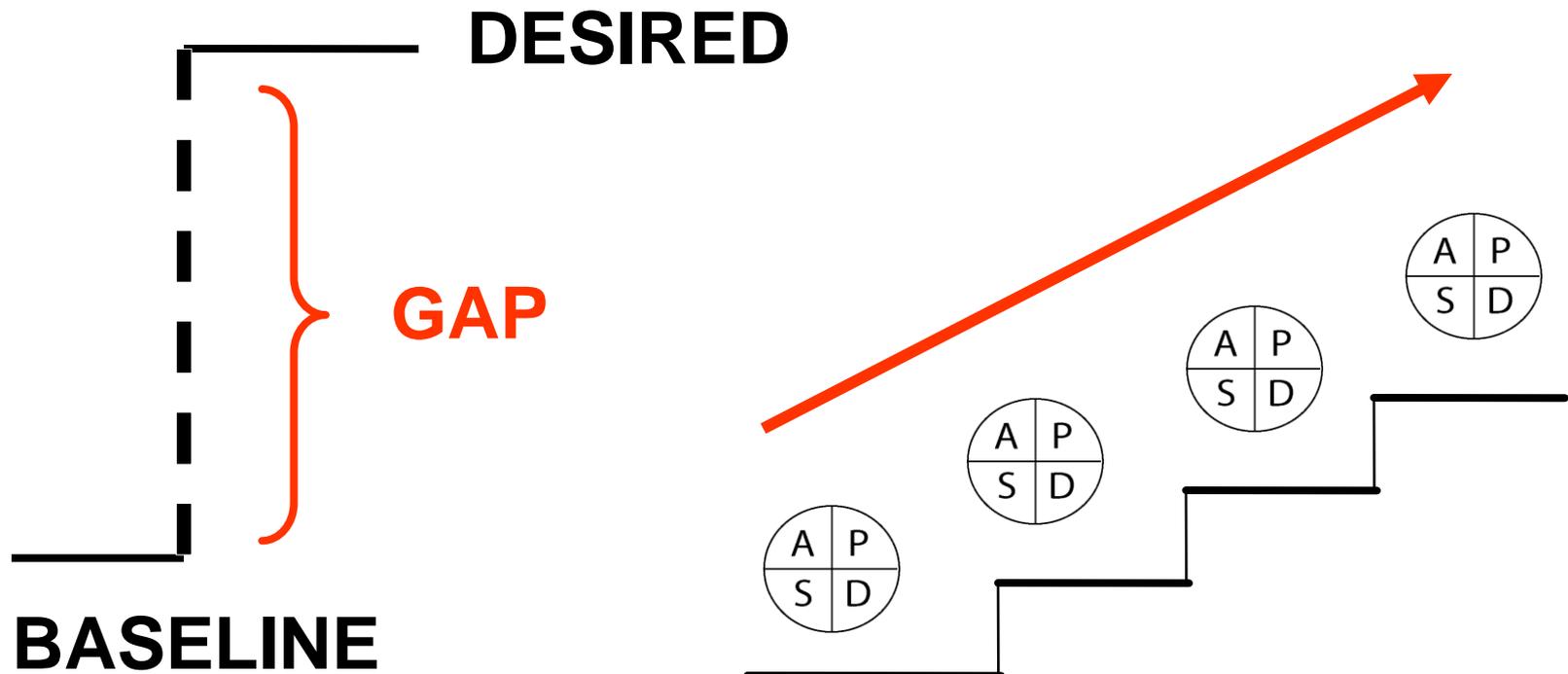- P = Process-oriented goals

- R = Results-oriented goals

S.M.A.R.T. Goals have both short and long term impact.

Breakthrough

Incremental

DESIRED

GAP

BASELINE

Levels of Evaluation

- Level 1: Task Completion

- Level 2: Participant Reaction

- Level 3: Sustained Participation in Project Support and/or Change

- Level 4: Demonstration of Independent Use of New Learning/Skills

- Level 5: Improved Quality of Life Outcomes for Participants

S.M.A.R.T. Goals are written at different levels.

Levels of S.M.A.R.T. Goals

Challenging, inspiring, strategic, far-reaching, community-based goals.

Strategic Goals:
5 years or more

Prioritized targeted area(s) based on your clients' unique needs.

Project Goals:
1-5 years

Focused on specific objectives within shorter timeframes based on the project plan.

Action Plans:
30-60-90 day goals

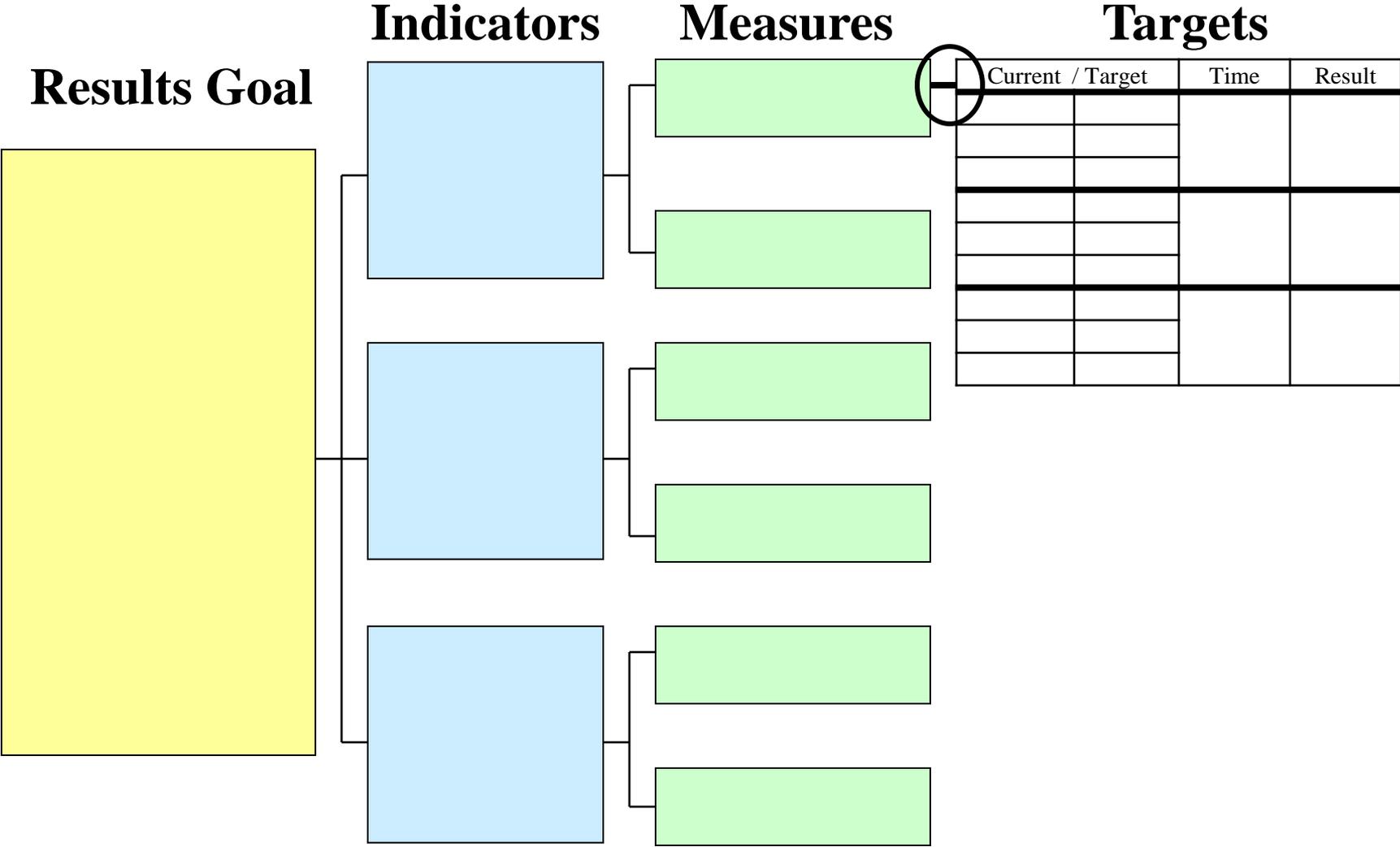Individual responsibilities associated with the project plan.
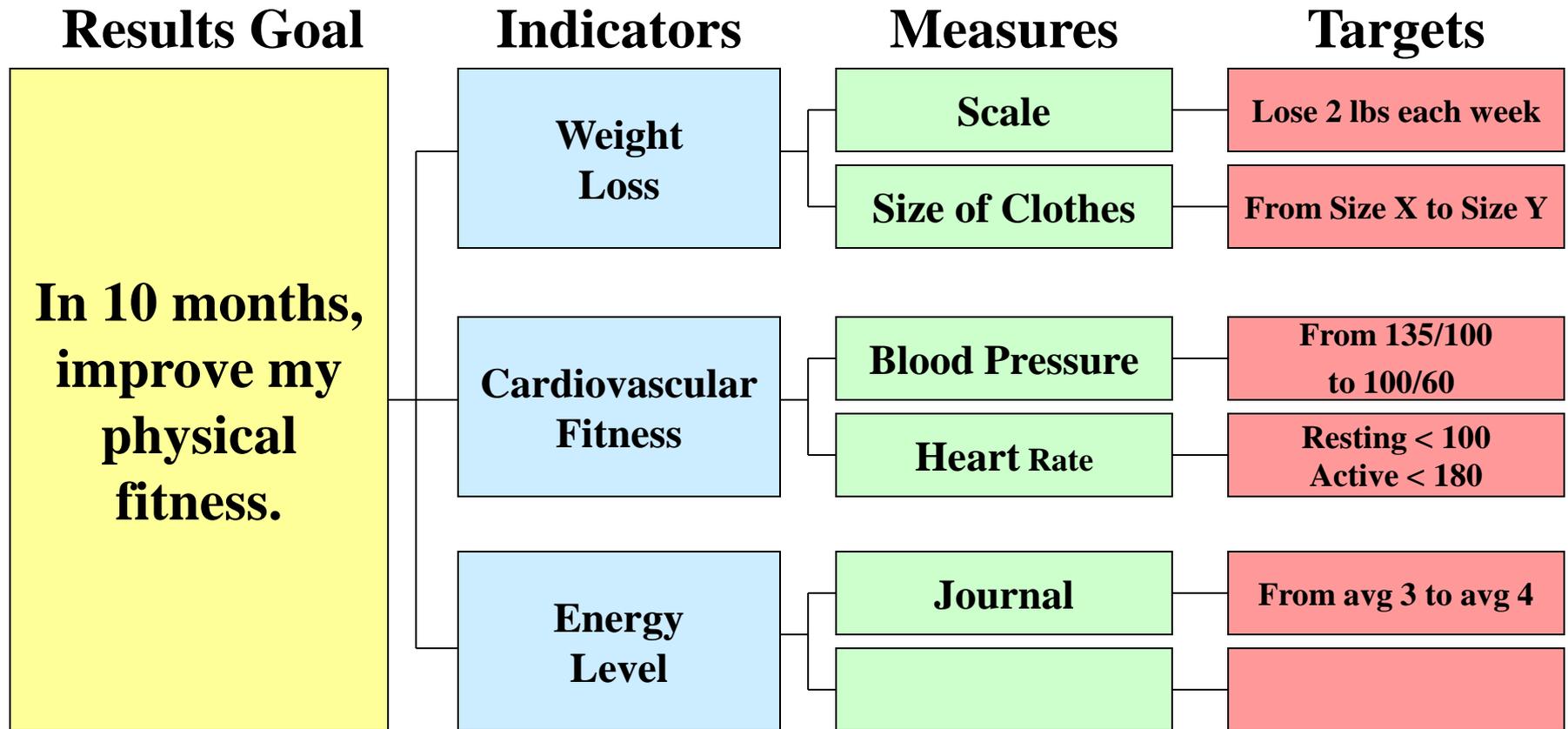
Will vary by role

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The Tree Diagram is… A Tool

- A graphic organizer
- A collaborative planning tool
- A template for making goals S.M.A.R.T.er
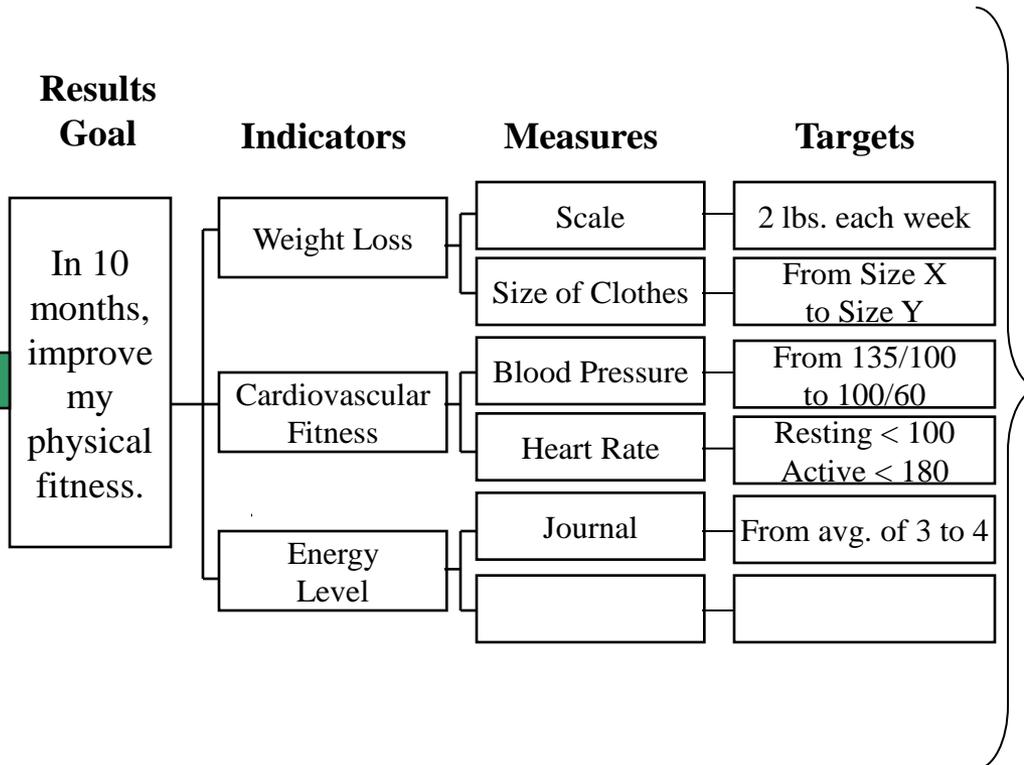
S.M.A.R.T. Goal Tree Template

Results Goal · **Indicators** · **Measures** · **Targets**

Current / Target		Time	Result

Bill's S.M.A.R.T. Goal Tree

Results Goal	Indicators	Measures	Targets
In 10 months, improve my physical fitness.	Weight Loss	Scale	Lose 2 lbs each week
		Size of Clothes	From Size X to Size Y
	Cardiovascular Fitness	Blood Pressure	From 135/100 to 100/60
		Heart Rate	Resting < 100 Active < 180
	Energy Level	Journal	From avg 3 to avg 4

Bill's Results for Planning & Improvement

VISION: Have a high quality of life

Results Goal	Indicators	Measures	Targets
In 10 months, improve my physical fitness.	Weight Loss	Scale	2 lbs. each week
		Size of Clothes	From Size X to Size Y
	Cardiovascular Fitness	Blood Pressure	From 135/100 to 100/60
		Heart Rate	Resting < 100 Active < 180
	Energy Level	Journal	From avg. of 3 to 4

Method

- **Exercise Classes**

- **Healthy Eating**

- **Support Group**

Pause…For Application!

S.M.A.R.T. Goal Tree

Create a S.M.A.R.T. Goal Tree for one aspect of your work or project.

S.M.A.R.T. Goal Tree Sample

Indicators **Measures** **Targets**

Results Goal

	Current/Target		Time	Result

Fifty (50) additional families will own affordable homes in the project neighborhoods by December 12, 2012.

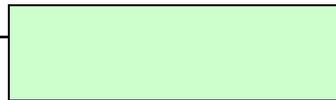**Project "process" goal: Provide a minimum of 3 hrs of housing counseling services to 240 families.**
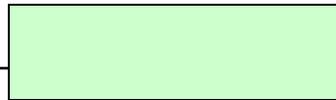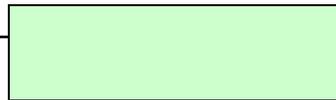
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S.M.A.R.T. Goal Tree Sample

Results Goal

Indicators	Measures	Targets		

Results Goal

Fifty (50) additional families will own affordable homes in the project neighborhoods by December 12, 2012.

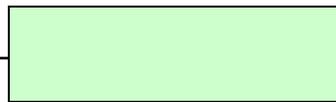**Project "process" goal: Provide a minimum of 3 hrs of housing counseling services to 240 families.**
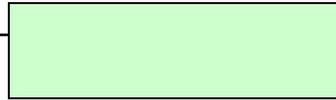
Indicators

Number of new homes built or purchased.

Number of new mortgages applied for and approved.

Number of new addresses applied for and received.

Targets

Current/Target		Time	Result

S.M.A.R.T. Goal Tree Sample

| | **Indicators** | **Measures** | **Targets** |

Results Goal

Fifty (50) additional families will own affordable homes in the project neighborhoods by December 12, 2012.

Project "process" goal: Provide a minimum of 3 hrs of housing counseling services to 240 families.

Indicators

Number of new homes built or purchased.

Number of new mortgages applied for and approved.

Number of new addresses applied for and received.

Measures

Municipal plat maps

Client feedback on project survey

Bank logs

Title company logs

Post office records

Client feedback on Project survey

Targets

Current/Target		Time	Result

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S.M.A.R.T. Goal Tree Sample

Results Goal

Indicators

Measures

Targets

Fifty (50) additional families will own affordable homes in the project neighborhoods by December 12, 2012.

Project "process" goal: Provide a minimum of 3 hrs of housing counseling services to 240 families.

Number of new homes built or purchased.

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Municipal plat maps

Client feedback on project survey

Bank logs

Title company logs

Post office records

Client feedback on Project survey

Current/Target		Time	Result
10	15	End	
	20	Of 2011	
	25		
	30	End of	
	40	2012	
	50		

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Break Time

"The team that became great didn't start off great —
it <u>learned </u>how to produce extraordinary results."
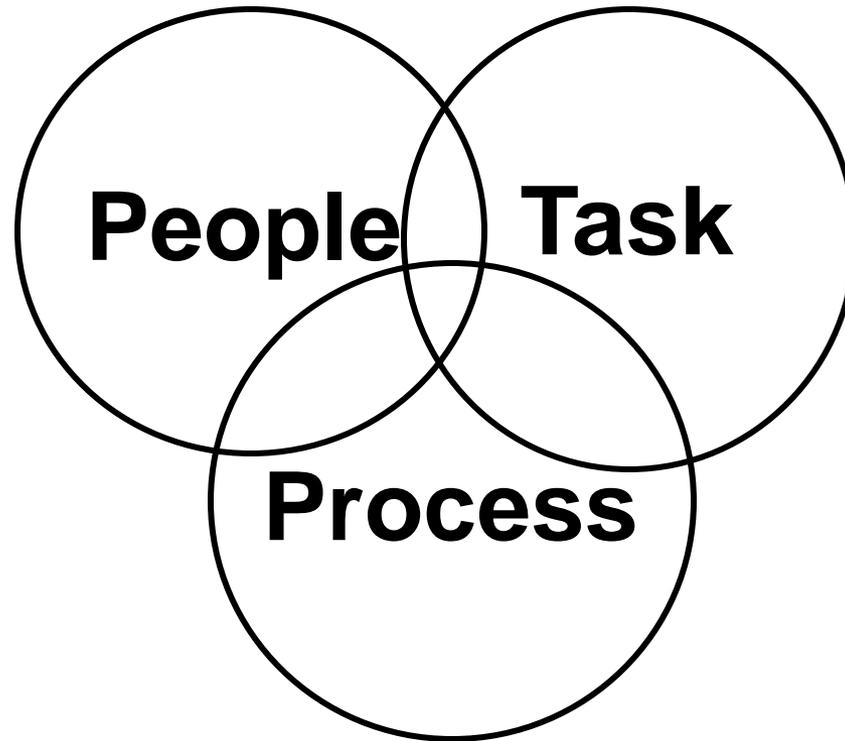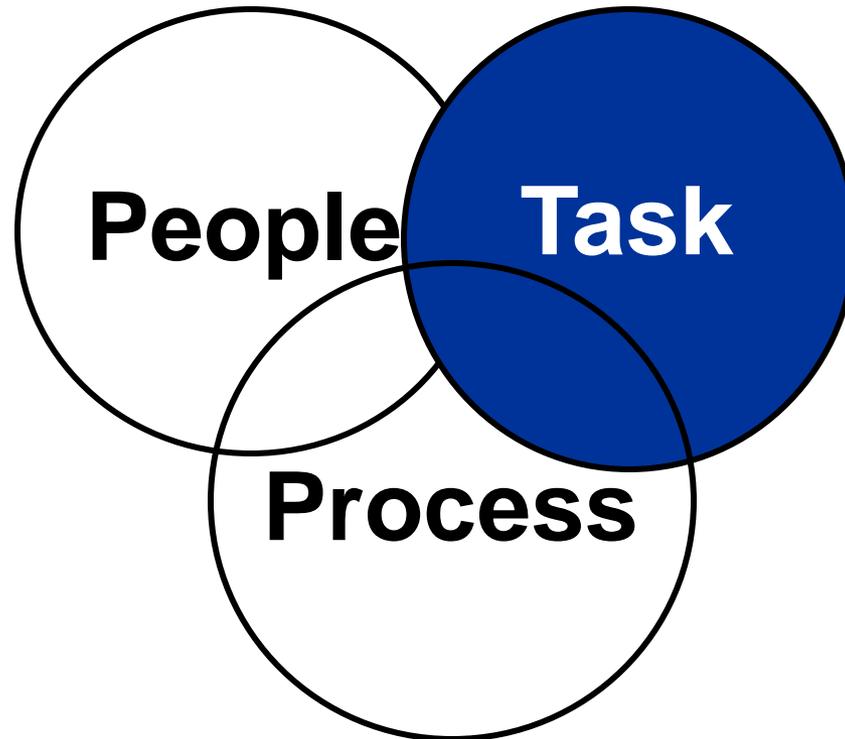

~ Peter Senge

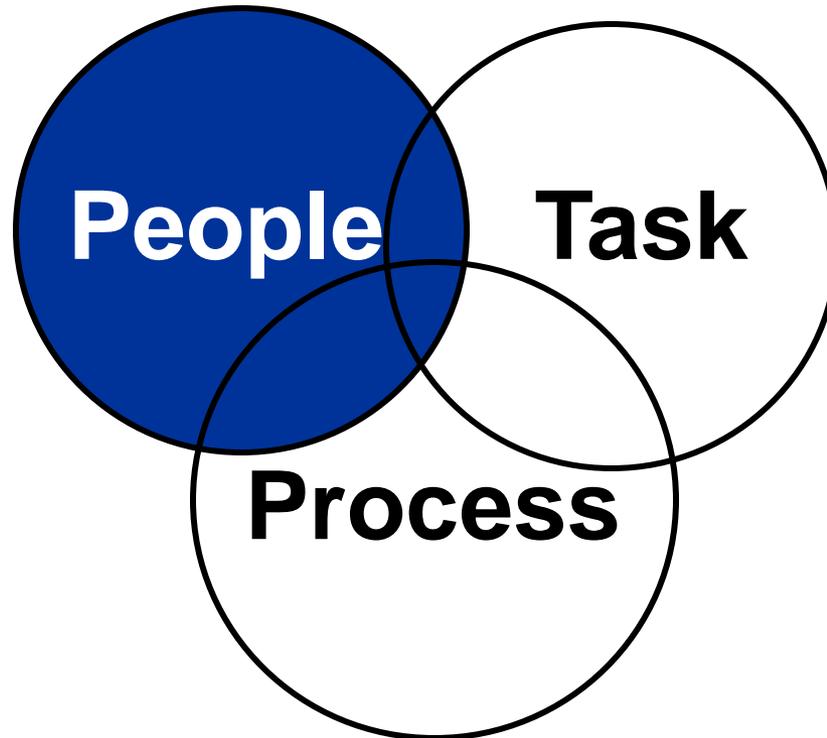# What are the Characteristics of an Effective Team?

The Cornerstones of Teamwork

The Cornerstones of Teamwork

The Cornerstones of Teamwork

Ground Rules

Suggested Topics:

- Attendance
- Promptness
- Equal Opportunity to Participate
- Conversational Courtesies

- Assignments
- Decision Making
- Confidentiality
- Meeting Evaluation
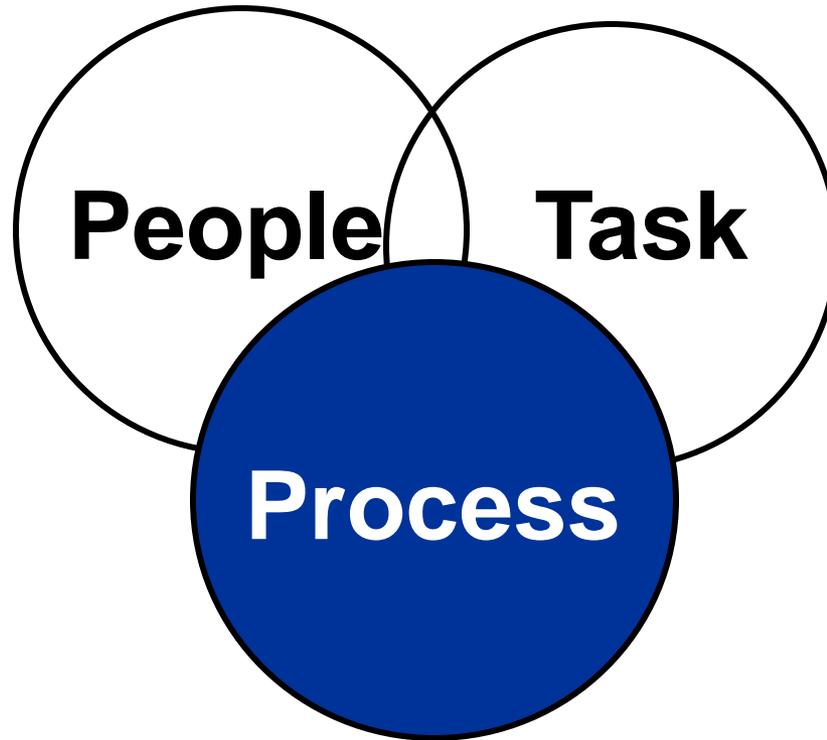- Accountability to Norms and Goals

Pause…For Application!

Ground Rules / Team Norms

Create a T-Chart. List the items on the left that represent the areas your team needs to work on and then identify one ground rule to address each.

The Cornerstones of Teamwork

Meetings are one of the most complex activities you 'do.' The success or failure of a meeting has a significant impact on you and your group.

~ M. Doyle & D. Straus,
How to Make Meetings Work

Turbo Meeting Simulation

Must meetings be deadly?

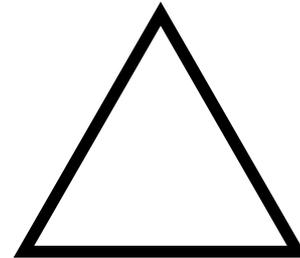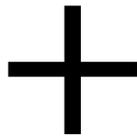Take a moment to write down your greatest irritations with meetings. This is your chance…

Turbo Meeting Simulation

- Facilitator (that's me)

- Timekeeper (1 volunteer)

- Scribes (1-2 volunteers)

- Goal - ???

Turbo Meeting Simulation

➕ What worked well?

➕ What could we change or improve?

+

△

Turbo Meetings Have…

Meeting Roles	Role Definitions
Facilitator	Keep the group on task. Establish the agenda.
Timekeeper	Keep the group on time.
Scribe	Record key ideas on chart paper during meeting.
Record Keeper	Keep official record of the meeting decisions and actions. Send record to attendees for follow-up.

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Rotate Meeting Roles

Agenda Date / Roles	Facilitator	Timekeeper	Scribe	Record Keeper
Week 1				
Week 2				
Week 3				
Week 4				

Turbo Meetings Have…

Meeting Process Evaluation
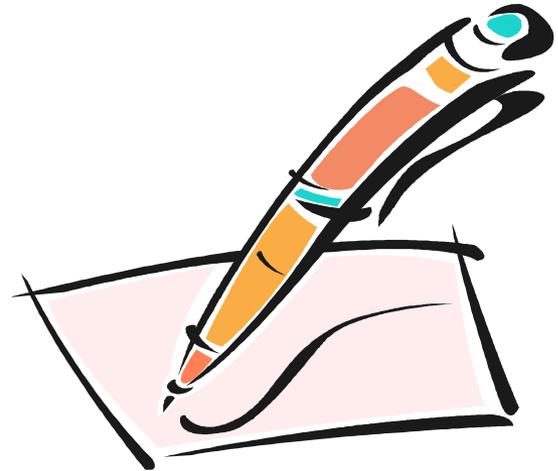
check outs

written feedback

group brainstorm: + / ▲

Turbo Meetings Have…

Agendas

- Purpose
- Guidelines for working together
- Meeting outcomes
- Topics
- Time estimates
- Lead people
- Methods or processes
- Flex items
- Action steps

Sample Agenda

PURPOSE: *To select strategies for achieving our S.M.A.R.T. Goal.*

Time	Topic	Outcome	Method or Process	Lead Person
3 min.	Check-in and review agenda	Focus	Share a distraction you brought to this meeting	Mark
2 min.	Guidelines for working together	Focus	Review guidelines	Charlie
20 min.	Research findings from Best Practice review	New learning from the research	Say something	Scott
30 min.	Discuss strategy options	Select 1-2 strategies	Multivote	Sam
10 min.*	Update sub-group data	Shared understanding	Review targets	Beth
5 min.	Checkout and evaluation	Meeting improvement	+ ▲	Ginger

* Flex Item

Pause…For Application!

Turbo Meeting Agenda

Create a turbo meeting agenda template that will work for you!

Taking Your Learning Home

| Make a list of the things you found most useful in today's session.	Which of these will you share with others? (☑ all that apply)	With whom would you like to share your new learning?	By when?	What is your desired result?

Essential Question

In what ways will having a S.M.A.R.T. Goal improve our ability to achieve the results that most matter to us?

Feedback Forms

- Individually complete your feedback form.
- Runner returns all feedback forms to your facilitator.
- Tidy your table.
- Thank you for your time and energy today!
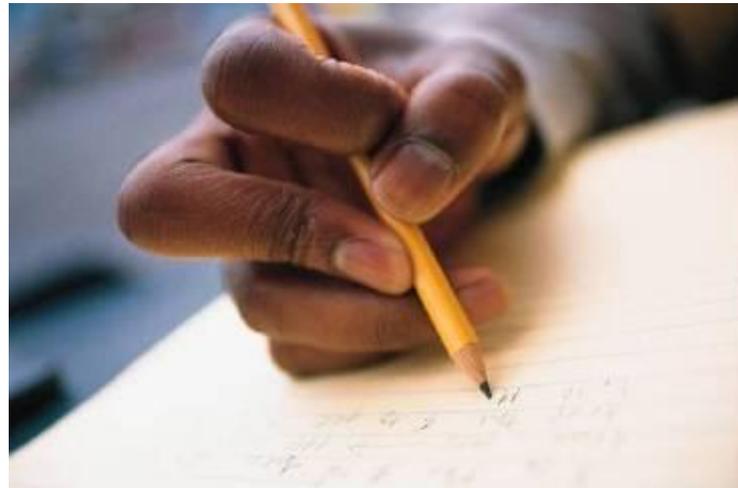
Thank you S.M.A.R.T. People!

www.smartlearningcommunity.net

THE place to connect with others who have discovered the power of S.M.A.R.T.

Quality Leadership By Design
The S.M.A.R.T. Way

Welcome Back!

Amy Sancetta / AP

Time for a Stretch Break!

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