“To set and work toward any goal is an act of courage.”

- Stephen Covey
HSIAC National Conference

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

February 2, 2011
Presented by: Anne Conzemius

QLD
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
Why are We Doing This?

Compliance

OR

Commitment

To Get Better Results!
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.”
S.M.A.R.T. Goals are gap closers toward your vision.
What is S.M.A.R.T.? 

Specific & Strategic 
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.
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

Following a recipe

RESULT
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.
Process vs. Results
Goal Exercise

\[ P = \text{Process-oriented goals} \]
\[ R = \text{Results-oriented goals} \]
S.M.A.R.T. Goals have both short and long term impact.
Breakthrough

GAP

BASELINE

DESIRED

Incremental
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.

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

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

Individual responsibilities associated with the project plan.

Strategic Goals: 5 years or more

Project Goals: 1-5 years

Action Plans: 30-60-90 day goals

Will vary by role
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

<table>
<thead>
<tr>
<th>Current / Target</th>
<th>Time</th>
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S.M.A.R.T. Goals Process

© QLD. 2010
Bill’s S.M.A.R.T. Goal Tree

Results Goal: In 10 months, improve my physical fitness.

Indicators:
- Weight Loss
- Cardiovascular Fitness
- Energy Level

Measures:
- Scale
- Size of Clothes
- Blood Pressure
- Heart Rate
- Journal

Targets:
- Lose 2 lbs each week
- From Size X to Size Y
- From 135/100 to 100/60
- Resting < 100 Active < 180
- From avg 3 to avg 4
Bill’s Results for Planning & Improvement

VISION: Have a high quality of life

Results Goal

In 10 months, improve my physical fitness.

Indicators

- Weight Loss
- Cardiovascular Fitness
- Energy Level

Measures

- Scale
- Size of Clothes
- Blood Pressure
- Heart Rate
- Journal

Targets

- 2 lbs. each week
- From Size X to Size Y
- From 135/100 to 100/60
- Resting < 100 Active < 180
- 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.
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.
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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<tbody>
<tr>
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<td>Number of new homes built or purchased.</td>
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S.M.A.R.T. Goal Tree Sample

Results Goal

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<td>Client feedback on project survey</td>
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<td>Number of new addresses applied for and received.</td>
<td>Bank logs</td>
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<td>Title company logs</td>
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<td></td>
<td>Post office records</td>
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S.M.A.R.T. Goals Process © QLD. 2010
S.M.A.R.T. Goal Tree Sample

**Results Goal**

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<td>50</td>
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</table>

Number of new mortgages applied for and approved.

- Client feedback on project survey
- Bank logs
- Title company logs
- Post office records
- Client feedback on Project survey
Break Time
“The team that became great didn’t start off great — it learned how to produce extraordinary results.”

~ Peter Senge
What are the Characteristics of an Effective Team?
The Cornerstones of Teamwork

People  Task  Process
The Cornerstones of Teamwork

- People
- Task
- Process
The Cornerstones of Teamwork

People

Task

Process
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

People  Task  Process
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?
<table>
<thead>
<tr>
<th>Meeting Roles</th>
<th>Role Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilitator</td>
<td>Keep the group on task. Establish the agenda.</td>
</tr>
<tr>
<td>Timekeeper</td>
<td>Keep the group on time.</td>
</tr>
<tr>
<td>Scribe</td>
<td>Record key ideas on chart paper during meeting.</td>
</tr>
<tr>
<td>Record Keeper</td>
<td>Keep official record of the meeting decisions and actions. Send record to attendees for follow-up.</td>
</tr>
</tbody>
</table>
### Rotate Meeting Roles

<table>
<thead>
<tr>
<th>Agenda Date</th>
<th>Roles</th>
<th>Facilitator</th>
<th>Timekeeper</th>
<th>Scribe</th>
<th>Record Keeper</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Week 1</td>
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<td>Week 2</td>
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<td>Week 3</td>
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<td>Week 4</td>
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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.

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

* Flex Item
Pause…For Application!

Turbo Meeting Agenda

Create a turbo meeting agenda template that will work for you!
## Taking Your Learning Home

<table>
<thead>
<tr>
<th>Make a list of the things you found most useful in today’s session.</th>
<th>Which of these will you share with others? <em>(☑ all that apply)</em></th>
<th>With whom would you like to share your new learning?</th>
<th>By when?</th>
<th>What is your desired result?</th>
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S.M.A.R.T. Goals Process © QLD. 2010
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.
Welcome Back!
Break!

a Stretch

Time for