This is the 3rd article of 6 in the Managing Performance Toolkit.
You can download the articles in this series, and other tools, at:
atctools.org/resources/tools-for-transformation

"If you don't know where you are going, you'll end up someplace else."
– Yogi Berra

In a recent study of thousands of senior managers, when asked to write down their three most important goals, over 70% failed to identify goals that would meet common acceptable standards for performance goals.

If you look at typical goals in our social change groups, you too often will see phrases that are not effective targets for driving high performance.
For example:

1. **Develop plans for our organizers to reach more people.**
   What's missing from this goal? Creating plans for organizers to reach more people is an activity that may or may not lead to the real goal of effectively engaging more people in support of campaigns. Also, how would we know if we achieved it?

2. **Research our donors past patterns of giving.**
   What's missing? It doesn't directly connect to the real goal of generating more income, and it's missing any clear criteria for success. There is also no set time frame.

3. **Improve communication between the campaign & development departments.**
   What's missing? It doesn't make clear what exactly needs to change and what's the actual result that will further the mission. What would success look like?

4. **Reorganize our management structure.**
   What's missing? There is no clear intended improvement in performance. Why reorganize the management structure? How would we know if it was achieved? And by when is this to be accomplished??

The most commonly used model for goals in our sector in **SMART Goals**:[1]

> **S**trategic: it focuses time and resources wisely regarding the mission
>
> **M**easurable: there are clear criteria for determining success
>
> **A**mbitious: it challenges and stretches towards high performance and impact
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> **R**ealistic: it's potentially do-able
>
> **T**ime-bound: time parameters and deadlines are clear

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[1] There are over 2000 variations of what the acronym SMART stands for. For instance, in addition to Ambitious, the A sometimes stands for Attainable, Agreed upon, Achievable, Acceptable, Action-oriented, etc. We recommend this version used by the http://www.managementcenter.org/goals-faq

How might the above goals be recreated as SMART goals?

SMART Goals:

1. Create a plan to recruit 1200 qualified new members by December 31 with at least 300 coming from each of the 3 communities we serve.

2. Analyze existing donors' past 5 years of giving, focusing on key criteria to optimize future campaigns. Deliver report by April 1 to Development Director with recommendations on how to increase donations from existing donors while using current donors to help generate contacts for expanding the pool.

3. Campaign and development departments will co-create a new fund-raising program, jointly committing to a revenue increase of 20% by year-end. A plan will be submitted to the management team within 60 days.

4. By year-end, increase programmatic coordination and accountability by:
   ● merging our 3 program initiatives into one unified department
   ● ensuring that no manager has more than 4 direct reports.
   ● creating an effective mechanism for ensuring more accurate budgeting for programs and greater financial oversight, leading to cost overruns of no more than a total of 10% across all programs

Some tips in goal-setting:

● **Goals should be strategic**
Individual goals should follow directly out of departmental or team goals.

● **Balance ambitious and realistic goals**
Good goals should help push towards greater results by stretching our sense of what's possible. But if they are too much of a stretch, they can discourage rather than incent extra effort and inventiveness. Unrealistic goals can also lead people to not take them seriously.

● **Goals sometimes need to change**
Goals will evolve in today's rapidly changing world. Certain kinds of work, such as advocacy, require rapid responses to opportunities and threats. This is fine, but changing goals should be a conscious act—not an excuse for failing to achieve them—and must be proactively renegotiated.

● **Number of goals**
As the number of goals starts to exceed 7-10, they become less useful as a serious guide to action.

- **Regarding Measurements**
  - o Some mission-critical goals in social change work are, in fact, hard to measure.
  - o What's important is for supervisors and staff to share, as clear as possible, an understanding of what success looks like.
  - o Break big goals into interim goals and smaller, measurable milestones

- **Incent collective success**
  In most organizations, success comes from teamwork. In goal setting, find ways to support collective effort. Goals that solely focus on individual tasks may hinder the teamwork needed for high performance.

- **Create agreement and alignment on goals**
  The goal setting process is as important as the goals. Make sure there is true ownership of goals by your people. Forcing staff to agree to goals does not lead to high performance. By watching and listening carefully, we can usually tell when someone is not really committed. We sometimes avoid noticing this lack of alignment, as it may feel awkward or inconvenient. Better to surface and deal with disagreements in the setting of goals, than be unpleasantly "surprised" when goals are not met.

  But, do make sure as the manager that you also are fully satisfied with the goals. Take the time to engage in whatever process is needed to come to true agreement.

"Goals are dreams with deadlines."
– Diana Scharf Hunt, author, time management expert