Strategic Planning: Goal Setting

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Often, organizations will complete a strategic planning session or do a SWOT analysis with the aim of creating an annual or multi-year plan. While this exercise is needed, many organizations stop there. They create a plan, they know what the end goal or main objective is but they often do not create specific steps to reach that goal, even more common, those goals have no metrics or responsible person tied to them.

How can you meet your end goal if you don't have steps in place to get there?

How will you know you've met it if you can't measure it?

You can use these worksheets to take you Mission, Vision, Core Values, SWOT Analysis or anything else you've worked on and create specific, measurable and timely goals tied to a staff member, board member or key volunteer.

Before you think about specific goals, think about the outcome or end results you want to achieve. These are based on your Values, Vision and Mission.

You also might consider the following perspectives:
- Financial - besides raising money, are there non-tangible investments we need to make?
- Clients (who you are serving) - what does success look like for them?
- Internal Processes - operations and program management, innovation.
- Employee Learning and Growth - consider the following:
  - Human Capital, what people do we need in place for success? Employees, Volunteers or Board Members
  - Information Capital - what information sharing or technology resources do we need?
  - Organizational Capital - what leadership supports should be in place?

Timeline
You might consider different lengths of time for different team members. A strategic plan is typically a long-term, 5-10 year plan.
- 5 years, making these plans would fall to the Board/CEO/Director
- 2-3 years, making these plans would fall to the Director with Board input
- 1 year, making these plans would fall to other employees, Director or key volunteers
- 6-12 months, these plans and action steps would fall to the front-line workers, employees or key volunteers

Now it's time to set your goals. Make sure they relate to all the work you've done so far and address the Risks you've identified. Use the following worksheet to make them SMART- Specific, Measurable, Attainable, Relevant and Time-focused.

We have provided these resources as a quick reference and we hope you find them helpful. If you'd like to schedule a more robust full-day Strategic Planning workshop led by one of our expert trainers, please complete the Training Request form (uafs.edu/ced/training-catalog.php). Our nonprofit members receive a discounted rate, for the Course Description, put 'Nonprofit Strategic Planning' and someone will be in touch with you soon.

Goal #1:

Specific – Who, What, When, Where, How, Why?

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Measurable – How will I know I met my goal (this should be a number, $, %...something quantifiable).

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Attainable – Is my goal realistic? Is it related to inputs or outputs?

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You may not be able to control outputs like how many volunteers sign up or how much money is raised. But you can control inputs, like how many volunteer groups you talk to or how often you show donor appreciation.

Relevant – Does my goal align with my values, mission and vision?

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Time-bound - When do I want to start and end?

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Goal #2:

Specific – Who, What, When, Where, How, Why?

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Measurable – How will I know I met my goal (this should be a number, $, %...something quantifiable).

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Attainable – Is my goal realistic? Is it related to inputs or outputs?

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You may not be able to control outputs like how many volunteers sign up or how much money is raised. But you can control inputs, like how many volunteer groups you talk to or how often you show donor appreciation.

Relevant – Does my goal align with my values, mission and vision?

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Time-bound - When do I want to start and end?

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Goal #3:

Specific – Who, What, When, Where, How, Why?

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Measurable – How will I know I met my goal (this should be a number, $, %...something quantifiable).

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Attainable – Is my goal realistic? Is it related to inputs or outputs?

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You may not be able to control outputs like how many volunteers sign up or how much money is raised. But you can control inputs, like how many volunteer groups you talk to or how often you show donor appreciation.

Relevant – Does my goal align with my values, mission and vision?

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Time-bound - When do I want to start and end?

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Goal #4:

Specific – Who, What, When, Where, How, Why?

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Measurable – How will I know I met my goal (this should be a number, $, %...something quantifiable).

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Attainable – Is my goal realistic? Is it related to inputs or outputs?

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You may not be able to control outputs like how many volunteers sign up or how much money is raised. But you can control inputs, like how many volunteer groups you talk to or how often you show donor appreciation.

Relevant – Does my goal align with my values, mission and vision?

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Time-bound - When do I want to start and end?

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Activities

Take your Goals and write 1-2 Activities or Objectives to achieve those goals. As a nonprofit, you may not be able to control outputs (like how much $ a donor gives) but you can control inputs (like how many donors you reach out to). Remember that when you are determining how you will reach your goals.

Goal #1:

Actvity 1 _____

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Activity 2 _____

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Goal #2:

Actvity 1 _____

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Activity 2 _____

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Goal #3:

Actvity 1 _____

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Activity 2 _____

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Goal #4:

Actvity 1 _____

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Activity 2 _____

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Responsibilities

You're almost there! This stage is where the rubber meets the road - assigning who will address each goal/ activity and what they are accountable for, so you can achieve your goals and reach your vision!

You can also use this section to create job descriptions, volunteer roles or an organizational chart, if needed. You might also discuss the following with your team:
- Do you have all the people you need?
- Do they have the necessary resources to do their work?
- How can you fill the needed roles?
- Are there priorities we should focus on with our existing staff/volunteers until we can hire/recruit more people?

Goal #1	Person(s) Responsible
Activity #1	
Activity #2	
Activity #3	

Goal #2	Person(s) Responsible
Activity #1	
Activity #2	
Activity #3	

Goal #3	Person(s) Responsible
Activity #1	
Activity #2	
Activity #3	

Goal #4	Person(s) Responsible
Activity #1	
Activity #2	
Activity #3	

Measuring Success

Tracking your progress will help ensure that your goals are met. Can you break the activities down quarterly or monthly? Can you assign a #, % or $ amount to the activities so you can measure progress?

Example:

1. Goal: Within 1 year (time bound) raise awareness about hunger (specific) in our community (relevant) by partnering with existing resources and organizations (achievable) to reach 500 people (measurable).
   - Activity #1: Attend existing community events.
     - o Person responsible: Executive Director, Board Members or Volunteers
     - o Measurement: Attend 1 community event every quarter, or 4/year.
     - o Distribute 300 flyers
   - Activity #2: Reach out to local schools about our program.
     - o Person responsible: Communications Team (specific board members and volunteers that have school connections).
     - o Measurement: Contact a new school each month, 12 annually.
     - o Distribute 200 flyers

Remember you may not be able to control outputs (none of the schools you reach out to may respond to you) but you can control the inputs, you can reach out to them, send them information or try to schedule a meeting.

Goal #1	Person(s) Responsible	Measurement (#, %, $)
Activity #1		
Activity #2		
Activity #3		

Activity #1		
Activity #2		
Activity #3		

Goal #3	Person(s) Responsible	Measurement (#, %, $)
Activity #1		
Activity #2		
Activity #3		

Goal #4	Person(s) Responsible	Measurement (#, %, $)
Activity #1		
Activity #2		
Activity #3		

Make sure to set up a follow up meeting to review. As our example above in Activity #2 - by June your team should have met with 6 local schools (or at least contacted 6) did they accomplish that?

At the end of the year assess your Activities and if they helped you – Did reaching out to 12 schools help raise awareness about hunger? Did you reach 500 new people?