

## How to Write SMART Goals:

A Guide for Association Volunteers

### What are SMART Goals?

- Statements of the important results you are working to accomplish
- Designed in a way to foster clear and mutual understanding of what constitutes expected levels of performance and successful development

What is the SMART criteria?

<b>S</b>	Specific: What will be accomplished? What actions will you take?
<b>M</b>	Measurable: What data will measure the goal? (How much? How well?)
<b>A</b>	Attainable: Is the goal doable? Do you have the necessary skills & resources?
<b>R</b>	Relevant: How does the goal align with broader goals? Why is it important?
<b>T</b>	Timebound: What is the time frame for accomplishing the goal?

How do I decide the right scope for my SMART Goals? (How big? How many?)

SMART goals are meant to address your major responsibilities.

Remember, goals are intended to focus attention and resources on what is most important so that you can be successful in achieving your priorities. SMART Goals are goals for your day-to-day operations.

Common types of goals are to:

- Increase something
- Make something
- Improve something
- Reduce something
- Save something
- Develop someone/something (yourself and/or association)

**Where to start?**

1. Start by thinking about your whole job and the broad areas (or “buckets”) of responsibility and results for which you are accountable.
2. Develop a goal statement for each bucket. To get the scope right, remember to focus on end results not tasks.
3. Goals should be high level enough to encompass the core outcomes for which you are responsible, but specific and clear enough so you will be able to measure success.
4. Goals should be on-going responsibilities and any new projects, assignments, priorities, or initiatives that are specific to this season.
5. Having too many goals can be an indicator that your goals are scoped at too low a level and are focused more on tasks than on end results.
6. If it seems that your goals are becoming too numerous and task-oriented, it may be helpful to consider combining several goal statements into a broader outcome area.

**How to write your S-M-A-R-T goal****S – Specific**

When setting a goal, be specific about what you want to accomplish. Think about this as the mission statement for your goal. This isn't a detailed list of how you're going to meet a goal, but it should include an answer to the popular 'w' questions:

- Who – Consider who needs to be involved to achieve the goal (this is especially important when you're working on a group project).
- What – Think about exactly what you are trying to accomplish and don't be afraid to get very detailed.
- When – You'll get more specific about this question under the “time-bound” section of defining S.M.A.R.T. goals, but you should at least set a time frame.
- Where – This question may not always apply, especially if you're setting personal goals, but if there's a location or relevant event, identify it here.
- Which – Determine any related obstacles or requirements. This question can be beneficial in deciding if your goal is realistic. For example, if the goal is to begin using PowerPoint presentations, but you've never used PowerPoint before, that might be an issue. As a result, you may refine the specifics of the goal to be “Learn how to use PowerPoint proficiently.”
- Why – What is the reason for the goal? When it comes to using this method for volunteers, the answer will likely be along the lines of association advancement or development.

“S” actions may include:

Oversee	Update	Write
Coordinate	Upgrade	Process
Supervise	Develop	Provide
Manage	Create	Maintain
Plan	Implement	Reconcile
Support	Evaluate	Direct
Transition	Produce	Administer

Note that this list does not include verbs like “improve,” “reduce,” or “increase” (e.g. “Improve customer service” or “reduce cost.” These imply the direction that you want a result to move in, but don’t do much to explain the role or specific action that you will take to accomplish this change.

### **M** – Measurable

What metrics are you going to use to determine if you meet the goal? This makes a goal more tangible because it provides a way to measure progress. If it’s a project that’s going to take a few months to complete, then set some milestones by considering specific tasks to accomplish. Milestones are a series of steps along the way that when added up will result in the completion of your main goal.

- As the “M” in SMART states, there should be a source of information to measure or determine whether a goal has been achieved.
- The M is a direct (or possibly indirect) indicator of what success for a specific goal will look like.
- Sometimes measurement is difficult, and managers and volunteers will need to work together to identify the most relevant and feasible data sources and collection methods.
- Data collection efforts needed to measure a goal can be included in that goal’s action plan.
- Even if a perfect, direct measurement source is not immediately feasible for a given goal, the discussion about the desired end-result (why this goal is important) and what the measurement options are (what success might look like) is an important and valuable part of planning.
- Measurement methods can be both quantitative (productivity results, money saved or earned, etc.) and qualitative (client testimonials, surveys, etc.).

Some typical data types and data collection methods may include:

Quality/accuracy rates	Automated reports
Amounts produced	Audits, tests
Revenue generated	Surveys
Productivity rates	Work products, samples
Customer Satisfaction	Other documents

### **A** – Achievable

This focuses on how important a goal is to you and what you can do to make it attainable and may require developing new skills and changing attitudes. The goal is meant to inspire motivation, not discouragement. Think about:

- how to accomplish the goal,
- if you have the tools/skills needed,
- if not, consider what it would take to attain them.

### **R** – Relevant

Relevance refers focusing on something that makes sense with the broader association goals. For example, if the goal is to launch a new program or service, it should be something that's in alignment with the overall mission/objectives. Your committee may be able to launch a new program, but if your board is not prioritizing launching that type of new program, then the goal wouldn't be relevant.

### **T** – Time-Bound

Anyone can set goals, but if it lacks realistic timing, chances are you're not going to succeed. Providing a target date for deliverables is imperative. Ask specific questions about the goal deadline and what can be accomplished within that time frame. If the goal will take three months to complete, it's useful to define what should be achieved half-way through the process. Providing time constraints also creates a sense of urgency.

## **The Easiest Way to Write S.M.A.R.T. Goals**

When it comes to writing S.M.A.R.T. goals, ask yourself and other team members a lot of questions. The answers will help fine-tune your strategy, ensuring the goals are actually attainable.

This doesn't have to be a daunting experience; in fact, it should be quite illuminating. Below we demonstrate how to write S.M.A.R.T. goals for two typical association scenarios: member retention and tournament participation. We've also created an easy-to-use S.M.A.R.T. goals template and worksheet to help you get started, which is provided at the end of this guide.

## **Examples of Creating a SMART Goal**

Here are two examples of initial goals we'll use to walk through this process:

1. Improve member retention
2. Increase tournament participation

This is a typical approach to creating goals, but both are vague. With the current wording, the goals probably aren't going to be attainable. The statements lack specifics, timelines, motivation, and a reality check.

Now, let's use the S.M.A.R.T. goals formula to clarify both and create new and improved goals.

### **Goal: Improve member retention**

- **Specific:** A majority of first-year bowlers are not returning for a second season and no one seems to know why or what we can do about it. I want to launch a survey to all first-year bowlers to have them indicate the primary reasons/issues that may keep them from returning for a subsequent season.
- **Measurable:** The reasons/issues that would prevent first year bowlers from returning will be compiled from the survey results and the board will confirm the top 1-2 reasons that the association has some measure of control over for strategic planning.
- **Achievable:** The survey will be written by our Association Manager and approved by the executive committee. We will pull a first-year member email list through WinLABS and published the survey through Survey.

- **Relevant:** To improve member retention, we must know the primary reasons/issues that prevent first-year bowlers from returning that we can affect as an association.
- **Time-Bound:** The survey must be written, approved and published within the next 30 days. Survey results must be prepared for consideration by the board at the next meeting in 60 days.

**Goal: Increase tournament participation**

- **Specific:** We have not experienced any growth in our local youth championships over the last 4 years, averaging only 20 teams. I would like to see a minimum of 20% increase participation for the 2019 Youth Championships.
- **Measurable:** This will be easily measured by the number of team entries.
- **Achievable:** I think we could achieve this by creating a referral incentive program which would award free singles entry for those that refer at least two friends who participate.
- **Relevant:** Since our youth are the future for the sport, this goal will impact tournament and membership health.
- **Time-Bound:** The program must be well defined by our Youth Committee in the next 30 days and promotion on our website, Face Book, and email marketing initiated at least 60 days prior to the 2019 Youth Championship entry deadline.

Once you go through and write your goals according to each S.M.A.R.T. characteristic, you can then combine and consolidate all the work you've done into one S.M.A.R.T. goal.

**S.M.A.R.T. goal: Improve member retention**

- **Description:** Identifying and executing actions that our association can take to affect member retention is critical. We will launch a survey in the next 30 days to first-year bowlers identifying the primary reasons/issues that may keep them from returning. Survey results will be compiled for consideration at the next board meeting in 60 days. The board will confirm the top 1-2 issues that the association has some control over for strategic planning.

- Milestone: First-year member survey launched in 30 days.
- Deadline: Survey results compiled for the board meeting in 60 days.

**S.M.A.R.T. goal: Increase tournament participation**

- Description: To grow 2019 youth tournament participation by a minimum of 20%, we will institute a bowler referral program where free singles entry is awarded for those that refer a minimum of 2 participants.
- Milestone: Define the referral program/process and promotional content within the next 60 days.
- Deadline: Launch website, Face Book, and email marketing campaigns 60 days prior to the 2019 Youth Championship entry deadline.

**More SMART Goal Examples**

## Ongoing

- Provide high quality customer service resulting in a 90% member satisfaction rating for timeliness and courtesy measures on an ongoing basis.
- On an ongoing basis, association financial reports will be reconciled by the 15th of every month with no increase in reconciliation errors.
- On an ongoing basis, 100% of board members will visit each league to meet and enhance relationships with league officers and bowlers.
- On an ongoing basis, 100% of board members will visit each association tournament to meet and enhance relationships with tournament volunteers and bowlers.
- By the end of each month the association website will be reviewed for necessary content updates/edits.
- Each season the association will send five email communications to our members – 1) Reminder (30 days prior), 2) Welcome (30 days in), 3) Newsletter (90 days in), 4) Recognition (2 weeks post), and 5) Thank you (30 days post).

- Beginning January 15, 2019, the board will complete the USBC Board and Director Evaluations for strategic planning purposes every two years beginning in 20\_\_.

#### New Project/Performance Cycle-Specific

- By January 30, 2019, the board will develop and implement an email and marketing platform and campaign plan to enhance customer touchpoints and marketing efforts.
- By February 15, 2019, the board will define two new fundraising strategies that a minimum of 20% of the proceeds will be targeted for association development.
- By December 6, 2019, the board will complete the development of a new board member orientation program.
- The board will allocate the necessary funds to update our website to a responsive (mobile friendly) format by January 31, 2019.
- By April 1, 2019, the board will define an annual center proprietor appreciation program.
- Each season's first board meeting will have an agenda item calling for an open reading, verbal commitment, and member signing of the following documents: 1) Board Obligations, 2) Commitment to Serve, 3) Code of Ethics, 4) Confidentiality Agreement, and 5) Conflict of Interest.

#### Development Goals

- By June 28, 2019, the board shall designate funds for the Finance Committee Chair to develop and apply upgraded computer skills that enable him/her to produce budget reconciliation reports each month in a timely and accurate fashion.
- By May 31, 2019, the board shall designate funds for the Association Manager to develop and apply upgraded PowerPoint skills to enhance the quality of association presentations.



## Template for writing a S.M.A.R.T. Goal

Crafting S.M.A.R.T. Goals are designed to help you identify if what you want to achieve is realistic and determine a deadline. When writing S.M.A.R.T. Goals use concise language but, include relevant information. These are designed to help you succeed, so be positive when answering the questions.

**Initial Goal** (*Write the goal you have in mind*):

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**1. Specific** (*What do you want to accomplish? Who needs to be included? When do you want to do this? Why is this a goal?*)

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**2. Measurable** (*How can you measure progress and know if you've successfully met your goal?*):

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**3. Achievable** (*Do you have the skills required to achieve the goal? If not, can you obtain them? What is the motivation for this goal? Is the amount of effort required on par with what the goal will achieve?*):

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**4. Relevant** (*Why am I setting this goal now? Is it aligned with overall objectives?*):

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**5. Time-bound** (*What's the deadline and is it realistic?*):

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**S.M.A.R.T. Goal** (*Review what you have written, and craft a new goal statement based on what the answers to the questions above have revealed*):

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