

Goal Setting Tool:

Explanation of Tool:

At KIPP, we understand that setting clear expectations and goals is fundamental to success for our students, our team and family, and our organizations. Setting goals for your organization/department/school is not fundamentally different than setting goals for an individual. This tool, therefore, focuses on setting performance goals at an organizational level. Specifically, it will help to clarify what a BIG ROCK is, how to set S.M.A.R.T. GOALS, and how to communicate these goals.

Why set goals?

Setting goals at the school, regional or team level clarifies what success will look like for the organization and its leader. It also clarifies how individuals in the organization will contribute to the team's success as a whole. When used on an ongoing basis, performance goals help your staff and board stay focused upon the organization's priorities. The goals of the school are also the goals of its principal, and the goals of the region are the goals of the ED. Many KIPP regions have found it useful to cascade goals from the regional level to the schools level and to the individual level to ensure clear alignment of priorities.

When to Use:

These templates and resources can be used to set goals at any level of the organization and can be used for teams/groups of people or an individual person.

Outcomes of the Process



- Clarify BIG ROCKS, or areas of accountability for your organization/department/team/school
- Set S.M.A.R.T. performance goals for your organization/department/team/school
- Start articulating how you can communicate your goals and continue to monitor progress for your goals

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Before you begin:

Before you begin setting goals for your region/department/team/school, you will want to review any other goals that may cascade down/up. If you have school or regional goals that will cascade to your team, present these to your team first, clearly explaining why each goal was chosen and discussing how individuals on the team impact the organizational goals.

Template:

The following “Big Rocks with Goal” Template can be used at any level of the organization. It provides prompts to ensure that goal setting is aligned to best practices. You may provide this template to your staff to set goals for a team/department/school/region.

NOTE: While this template provides a specific example of *how* to set goals, the output of the process (the filled in template) can be the basis for your organizational dashboard. If you properly execute goal setting, you will have the ability to monitor progress on goals and understand how your organization is moving forward in service of your goals.

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Big Rocks with Goal Template:

Cascade Connection	Big Rock	S.M.A.R.T Performance Goal	Key Strategies/Milestones	Owners
<p><i>What connections does this Big Rock have with:</i></p> <ul style="list-style-type: none"> <i>Your Strategic Plan and its Multi-Year Outcomes or Imperatives</i> <i>Annual Priorities</i> <i>Your region</i> <i>The Foundation's Six Essential Questions</i> 	<p><i>What is the area of accountability?</i></p>	<p><i>What are the specific measures of success in your Big Rock?</i></p>	<p><i>What will you DO to move towards the Big Rock and towards achieving your performance goal? When useful, you may also include milestones indicating how you will know you are moving towards your goal.</i></p>	<p><i>Who are the specific people who are responsible for moving the organization forward to achieve the goal?</i></p>
	<p><i>Big Rock #1</i></p>			
	<p><i>Big Rock #2</i></p>			
	<p><i>Etc.</i></p>			

Big Rocks with Goal Template (explanation):

What is a “Cascade Connection”?

Cascade Connection

What connections does this Big Rock have with:

- *Your Strategic Plan and its Multi-Year Outcomes or Imperatives*
- *Annual Priorities*
- *Your region*
- *The Foundation’s Six Essential Questions*

A “Cascade Connection” is a reminder to connect how this organization/department/team/school’s goals connect to other parts of the organization. *For example, if you are a school, you will want to connect each of your Big Rocks with the Region’s Annual Priorities or Big Rocks. If you are a department in the central office, you will need to connect your Big Rock’s with the Region’s Big Rocks.*

This is a placeholder, and you will want to adjust the light blue question (*What connections does this Big Rock have with. . .*) as you see fit.

What is a “Big Rock”?

Big Rock

What is the area of accountability?

A Big Rock is a description of your area of accountability. It will describe the categories of performance that are most essential to your organization/department/team/school. Big Rocks are often phrased as a simple verb and a noun.

Big Rocks with
Goals

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Examples of potential School Big Rocks:

- Drive Student achievement / Achieve academic excellence
- Prepare students for high school and college
- Manage and develop staff
- Oversee operations
- Sustain culture
- Build parent and community relationships

What is a “S.M.A.R.T Performance Goal”?

S.M.A.R.T Performance Goal

*What are the specific measures of
success in your Big Rock?*

A S.M.A.R.T. Performance Goal describes specific measures of success for your Big Rock. These descriptions should be focused on outcomes to be successful.

Examples of areas of accountability and associated goals:

- *Achieve academic excellence.* School-wide, 90% of students will meet the standard on the reading, math, science, social studies and writing TAKS tests during the 2010-2011 academic year.
- *Manage and develop staff.* 85% of the core and extra-curricular teaching staff who are invited to return will return for another year of employment.
- *Cultivate individual donors.* Raise \$300,000 in individual gifts by year’s end.

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SMART Criteria for performance goals

S	SPECIFIC AND SIGNIFICANT: Set performance goals that are focused on <u>specific results</u> or outcomes, not activities or inputs. Your performance goals should be limited to the few that are of the greatest importance to the organization and that will have a dramatic impact on the overall success of your team or the organization. Discuss with your manager how you will prioritize achievement of these goals and how they might be weighted in your evaluation.
M	MEASURABLE: Choose goals that are quantifiable, measurable, and reportable when possible. Direct measures of output exist for metrics around <u>quantity, quality, cost, and time</u> .
A	AGREED-UPON: Goals must be understood and agreed upon by both the manager and employee in order to build commitment to reaching the goals.
R	REALISTIC: The metric should be challenging, representing high expectations, but also attainable. Some goals should be a stretch.
T	TIME SPECIFIC: Indicate the timeframe in which you expect to complete the goal and timeframes for achieving the goal's key strategies and milestones.

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What are “Key Strategies/Milestones”?

Key Strategies/Milestones

What will you DO to move towards the Big Rock and towards achieving your performance goal? When useful, you may also include milestones indicating how you will know you are moving towards your goal.

Key Strategies/Milestones will be an expression of what the organization/team/department/school will do to make progress on the Big Rock and towards achieving the performance goal. It will be specific actions that the organization/team/department/school will do to achieve the goal and should include timing of those actions. It will not be a detailed workplan, but rather an expression of the most important strategies for achieving the goals.

- Examples of strategies/milestones
 - Discuss results of monthly standards-based assessments with leadership team;
 - Hold one-on-ones with my direct reports twice monthly;
 - Student recruitment plan complete by January 15;
 - Create HR filing system by February 1 and update it on ongoing basis;
 - Administer benchmarks 3 times this year. 75% of 5th grade students proficient or above in math benchmark by late November.

Who are the “owners”?

An owner designates the specific staff accountable for the goal. These are the people in the organization/team/department/school who will be responsible for making progress against the goal. Note, these people will not necessarily perform all of the strategies/tasks associated with the goal, but will be responsible that someone is performing them. Depending on the level at which you are setting goals, there could be varying owners.

For example, for student achievement goals, teachers are the owners of their content area(s) and grade level(s), AP’s, school leaders, CAO’s, and ED’s are also accountable for student achievement goals.