5

ORGANIZATIONAL GOAL SETTING

Dr. Jennifer R. Madden

THE RESEARCH SUGGESTS

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YOUTH CALIFORNIA

1. Grant Writing FUNdamentals (7/24/24)

2. Grant Writing Toolkit (7/30/24)

3. Strategic Planning FUNdamentals (10/24/24)

4. Strategic Planning Toolkit (11/7/24)

next steps on the
JOURNEY

6. Planning your Work, Working your Plan (2/20/25)

Organizational Goal Setting (TODAY!)

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DESCRIPTION

Today participants use practical tools to set strategic goals that align with their organizational mission. The tools and skills will enable participants to create actionable goals ready to implement in their programs that drive meaningful impact.

LEARNING OBJECTIVES

➤ Explore the causes and effects of a particular issue using the problem tree analysis design thinking tool.

➤ Understand the distinction and interconnection of organizational goals and project goals.

➤ Learn and apply tools for setting clear, measurable, and mission-driven goals.

➤ Participants will learn how to craft clear, actionable, and measurable objectives using proven methods like the SMART framework, SWOT analysis, and logic models.

AGENDA: ORGANIZATIONAL GOAL SETTING

A. Problem Tree Analysis

B. Goals & Objectives

Previous Practical & Applicable Tools:

C. SMART & SMARTIE Objectives

➤ Specific   ➤ Inclusion

➤ Measurable   ➤ Equity

➤ Achievable

➤ Relevant

➤ Time-bound

D. SWOT Analysis

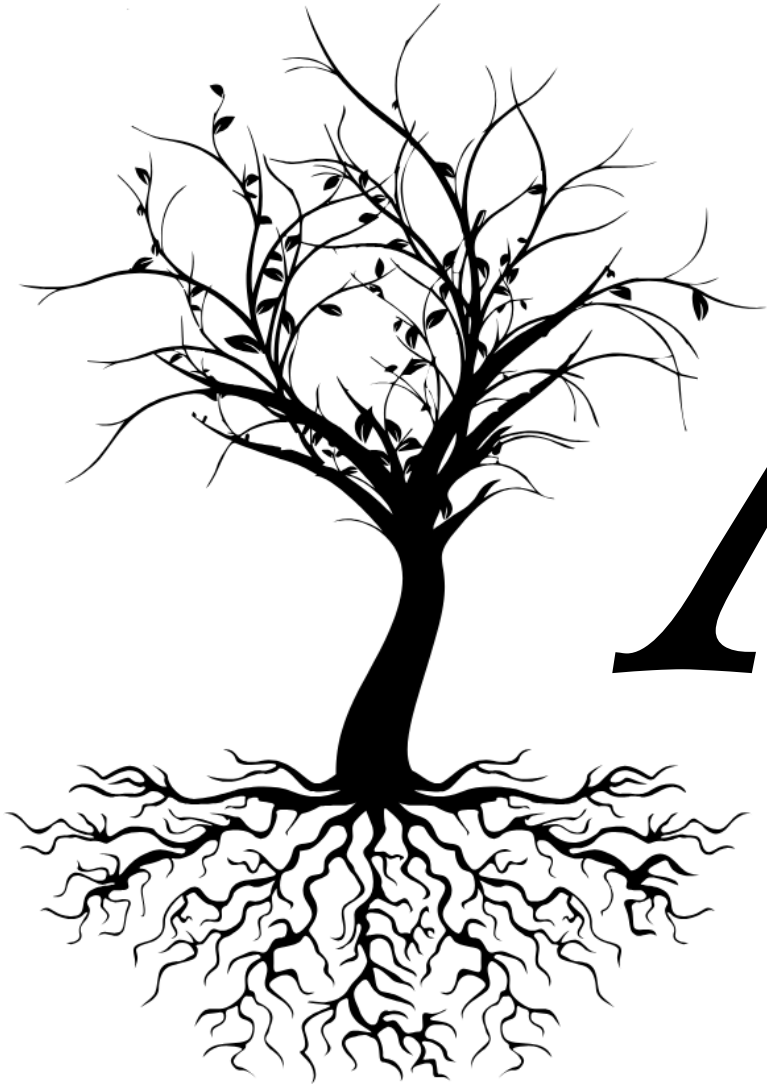E. Logic Models

Chat Storm

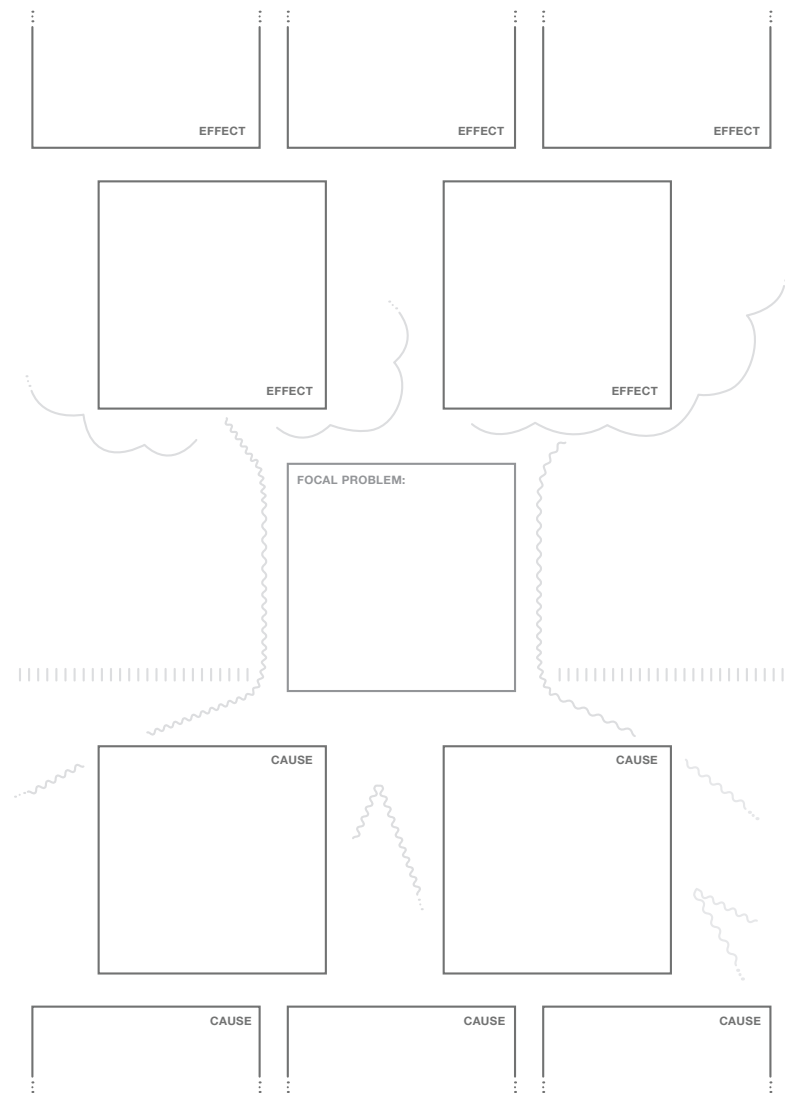*Core Concept & Toolbox Icon*

5

WHAT IS A GOAL FOR YOUR PROJECT

"If your program achieved one major success this year, what would it be?"

A PROBLEM TREE ANALYSIS

*A way of exploring the causes and effects of a particular issue.*

EFFECT

EFFECT

EFFECT

EFFECT

EFFECT

FOCAL PROBLEM:

CAUSE

CAUSE

CAUSE

CAUSE

CAUSE

PROBLEM TREE ANALYSIS

➤ Builds a shared understanding.

➤ Using the tree as a metaphor, you separate the causes (roots) from the effects (branches) of a central issue (trunk).

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PROBLEM TREE ANALYSIS

➤ Place your challenge in the trunk.

➤ Discuss effects (branches).

   ➤ Write above the challenge.

➤ Discuss causes (roots).

   ➤ Write them below the challenge.
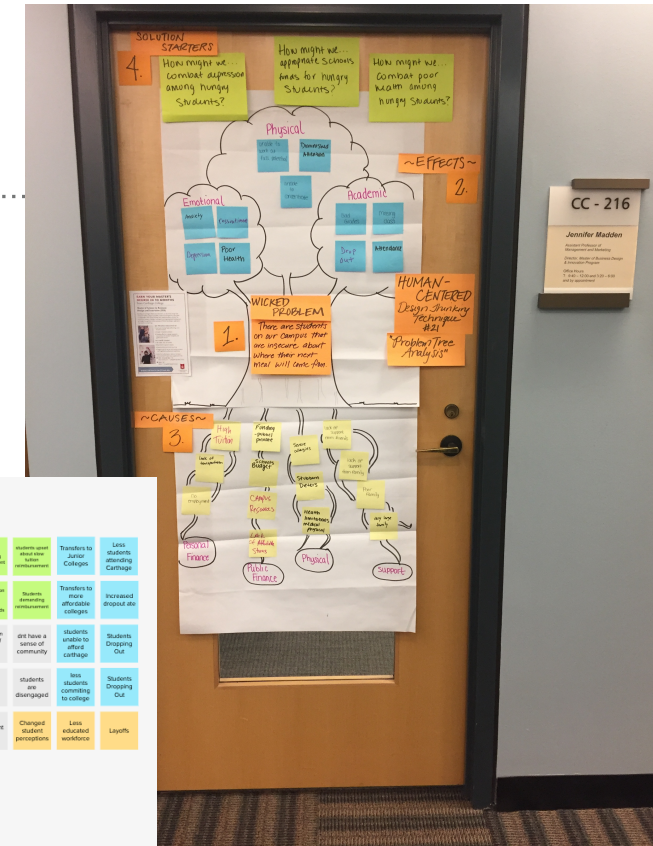
PROBLEM TREE ANALYSIS

➤ Start in the leaves (effects).

➤ Then move to the roots (causes)… I want the roots on your mind!

Challenge:

"Food Insecurity"

https://app.mural.co/t/ sass4098407/m/ sass4098407/1737005800875/ 6d0ea9fb386552933e1a3027f6 09a06731d507a6? sender=ubc39c30ef00bed36831 b3485

Link to Mural Board with Problem Tree Analysis

B GOALS & OBJECTIVES

GOALS

Organizational goals are the measurable long-term and short-term steps that will be carried out on a daily, weekly, monthly or yearly basis.

GOALS & OBJECTIVES

What is the difference?

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Aspect	Goals	Objectives
Definition	Broad, overarching aspirations or desired outcomes.	Specific, measurable actions or steps to achieve a goal.
Scope	High-level and general. Focused on the "big picture".	Narrow and precise. Focused on details and implementation.
Purpose	Define what you want to achieve in the long term.	Define how you will achieve the goal in practical terms.
Time Frame	Tend to be longer-term (e.g., months to years).	Tend to be shorter-term (e.g., weeks to months).
Specificity	Broad and often qualitative.	Specific, measurable, and often quantitative.
Measurement	Evaluated by overall outcomes or progress.	Evaluated by completion of specific tasks or milestones.
Relationship	Goals provide the "why" and "what".	Objectives provide the "how" and "when".

GOALS & OBJECTIVES

➤ Goals support the vision or desired end state.

   ➤ Goals answer the question: *What do we ultimately want to achieve?*

➤ Objectives break down the goals into actionable steps.

   ➤ Objectives answer the question: *What specific actions do we need to take to achieve the goal?*

➤ Example:

   ➤ Goals — the destination on a map.

   ➤ Objectives — the turn-by-turn directions to get there.

   ➤ Both are essential, but serve different roles in guiding efforts.

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ORGANIZATIONAL GOALS & PROJECT GOALS

What is the difference?

ORGANIZATIONAL GOALS & PROJECT GOALS

➤ Organizational Goal:

    ➤ *Increase access to educational opportunities for 10,000 underserved youth within the next 5 years.*

➤ Characteristics of Organizational Goals:

    ➤ Broad

    ➤ Mission-driven

    ➤ Strategic

➤ Project Goal:

    ➤ *Develop and launch an after-school mentorship program for 200 students by the end of the year.*

➤ Characteristics of Project Goals:

    ➤ Specific

    ➤ Tactical

    ➤ Tied to delivering a particular initiative

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Aspect	Organizational Goals	Project Goals
Purpose	Set the overarching direction and priorities for the entire organization.	Focused on achieving specific outcomes or deliverables within a defined scope.
Scope	Broad and long-term, encompassing multiple initiatives, departments, or functions.	Narrow and short-term, related to a specific project or initiative.
Time Frame	Typically span several years (strategic goals) or are ongoing (mission-based goals).	Defined by the project timeline, often weeks to months, or up to a few years.
Alignment	Must align with the organization's mission, vision, and values.	Must align with both organizational goals and the project's purpose.
Stakeholders	Impact the entire organization, including internal and external stakeholders.	Primarily affect stakeholders directly involved in the project.
Focus	Address high-level objectives such as growth, innovation, or community impact.	Address specific tasks, deliverables, or measurable outcomes for a particular effort.
Measurement	Evaluated through organizational KPIs like revenue growth, customer satisfaction, or social impact.	Evaluated through project-specific metrics like time, budget, quality, and scope achievement.
Flexibility	Tend to be more flexible and adapt to changes in the external environment.	More rigid, as they are tied to predefined project constraints (time, scope, budget).

KPI = Key Performance Indicator

EXAMPLE

Integrating a clear SMART Goal, detailed SMART Objectives, and measurable indicators ensures progress can be tracked and success evaluated. It provides actionable steps while aligning with the youth program's mission to enhance leadership skills in underserved communities.

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ABC YOUTH ORGANIZATION

➤ Mission

➤ Enhance the leadership skills among participants in underserved communities.

➤ **SMART Goal**

➤ Increase the leadership skill levels of 100 youth participants in underserved communities by 20% within the next 12 months through targeted training programs and mentorship opportunities.

SMART OBJECTIVES

#1: Design a leadership program	Design and launch a 12-week leadership training program by the end of Q1.
#2: Recruit and onboard mentors	Recruit and onboard 20 qualified mentors within the first three months to support program participants.
#3: Enroll participants	Enroll 100 youth participants in the program by the end of Q2.
#4: Conduct evaluations	Conduct pre- and post-program evaluations to measure a 20% improvement in participants' leadership skills.

MEASUREMENTS & INDICATORS

SMART Objective	Measure	Indicator
#1: Design a leadership program	Completion of program design by deadline.	Number of modules created and approved.
#2: Recruit and onboard mentors	Number of mentors onboarded and trained.	Percentage of mentors meeting criteria.
#3: Enroll participants	Total number of enrolled participants.	Participant demographics confirming underserved focus.
#4: Conduct evaluations	Improvement in pre- and post-scores.	Percentage of participants achieving a 20% increase.

SMART OBJECTIVES

➤ *Objective 1:* Design and launch a 12-week leadership training program by the end of Q1.

  ➤ Measure: Completion of program design and curriculum approval.

  ➤ Indicator: Number of training modules created and approved by the leadership team.

➤ *Objective 2:* Recruit and onboard 20 qualified mentors within the first three months to support program participants.

  ➤ Measure: Number of mentors recruited and trained.

  ➤ Indicator: Percentage of mentors meeting qualification criteria (e.g., three or more years of leadership experience).

➤ *Objective 3:* Enroll 100 youth participants in the program by the end of Q2.

  ➤ Measure: Number of participants registered.

  ➤ Indicator: Participant demographic data confirming focus on underserved communities.

➤ *Objective 4:* Conduct pre- and post-program evaluations to measure a 20% improvement in participants' leadership skills.

  ➤ Measure: Average score increase between pre- and post-assessments.

  ➤ Indicator: Percentage of participants showing at least 20% improvement in evaluation scores.

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Recall:

C SMART & SMARTIE OBJECTIVES

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DEFINING SMART OBJECTIVES

➤ Specific

➤ Measurable

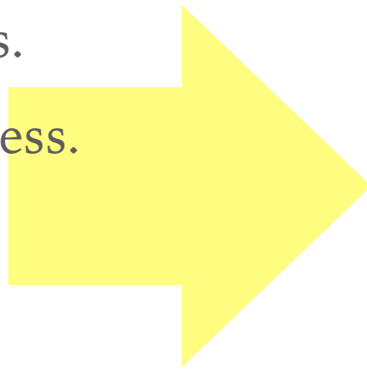➤ Achievable (though ambitious, and agreed upon)

➤ Relevant

➤ Time-bound

SMART AND NOT-SO-SMART OBJECTIVES

➤ Poorly-Written Objective

  ➤ To eliminate highway deaths.

  ➤ To improve healthy food access.

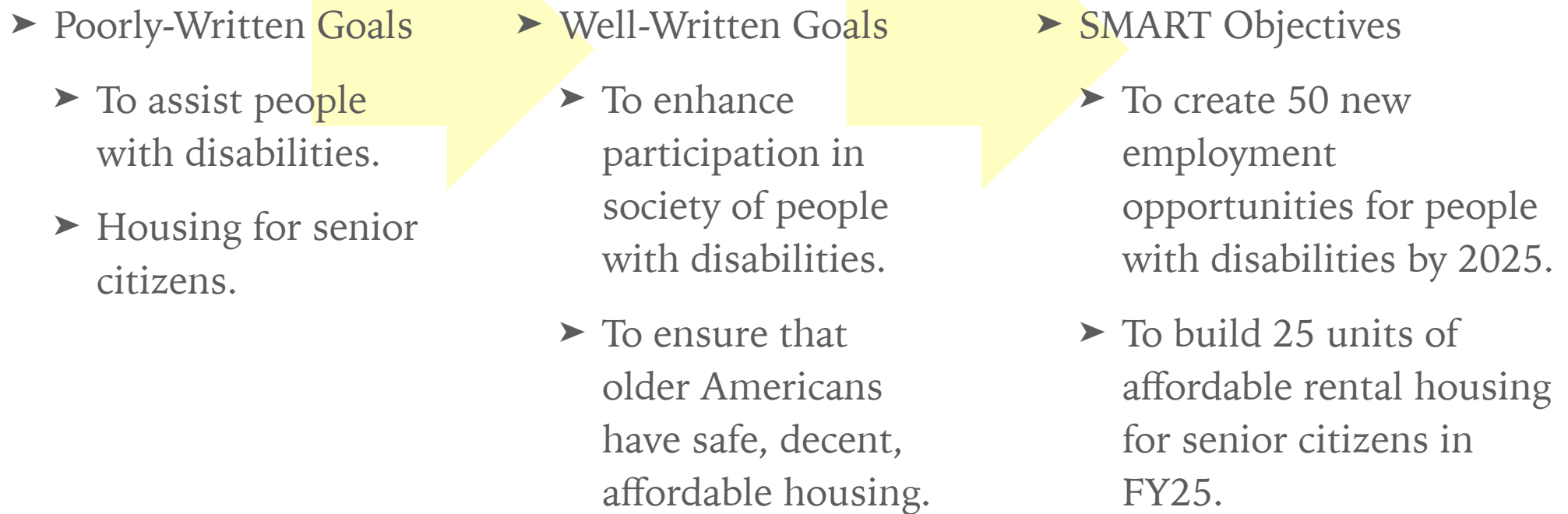 ➤ To provide faster service.

  ➤ Housing for senior citizens.

➤ SMART Objectives

  ➤ To reduce by 5% the highway accident rate in FY25.

  ➤ To develop 12 community gardens by Summer 2025.

  ➤ To reduce waiting time by 15% in one year.

  ➤ To build 25 units of affordable rental housing for senior citizens in FY25.

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GOALS SHOULD SPECIFY CLEAR, PURPOSEFUL OUTCOMES

➤ Poorly-Written Goals

  ➤ To assist people with disabilities.

  ➤ Housing for senior citizens.

➤ Well-Written Goals

  ➤ To enhance participation in society of people with disabilities.

  ➤ To ensure that older Americans have safe, decent, affordable housing.

➤ SMART Objectives

  ➤ To create 50 new employment opportunities for people with disabilities by 2025.

  ➤ To build 25 units of affordable rental housing for senior citizens in FY25.

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DEFINING SMARTIE OBJECTIVES

➤ Specific

➤ Measurable

➤ Achievable (though ambitious, and agreed upon)

➤ Relevant

➤ Time-bound

➤ **Inclusion**

➤ **Equity**

From SMART...	... to SMARTIE
Build a volunteer team of 100 door-to-door canvassers by May…	…with at least 10 people of color recruited as volunteer leaders first, so that they can help shape the way we run the canvasses.
Run a successful annual conference with 20% more attendance…	…and people of color making up at least 50% of the panelists.
Expand youth mentorship program into three new counties by the end of June...	...with volunteer task forces that are representative of the community (by age, gender, race, and other characteristics) advising the expansion.
Redesign community grant program by the end of June...	...to prioritize organizations that center inclusion and equity in their work.

https://www.idealist.org/en/careers/better-than-smart-smartie-goals

Recall:

D SWOT ANALYSIS

SWOT ANALYSIS WORKSHEET

Organization:				
	Current		*Future*	
	Strengths	**Weaknesses**	**Opportunities**	**Threats**
External				
Internal				

SWOT ANALYSIS

➤ Strengths

➤ Weaknesses

➤ Opportunities

➤ Threats (or Challenges)

S	*W*
O	*T*

E
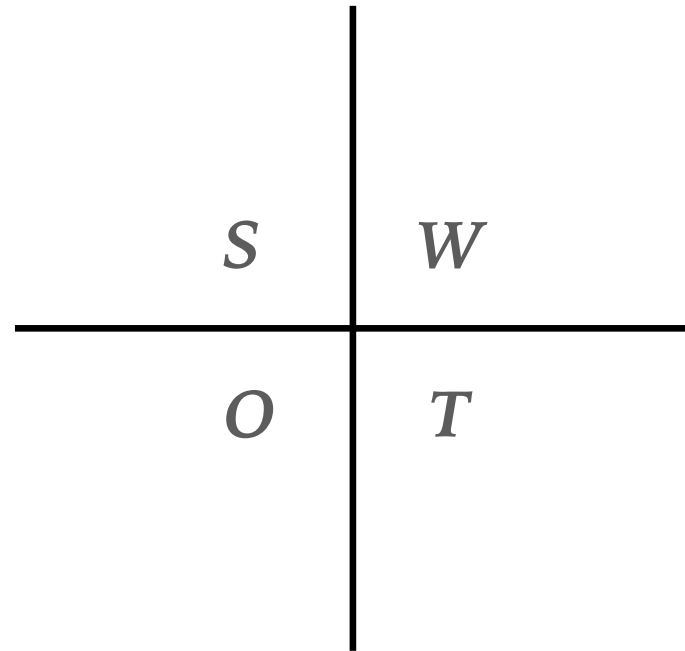
Recall:

LOGIC MODELS

Elevate Youth California Logic Model

Elevate Youth California (EYC) is a statewide program addressing substance use disorder by investing in the leadership development and civic engagement of youth of color and 2S/LGBTQ+ youth ages 12 to 26 living in communities disproportionately impacted by the war on drugs.

Logic Model Assumptions

The following assumptions and external factors ground the EYC work and approach.

1.

The war on drugs disproportionately affected Black, Indigenous, and other communities of color and low-income communities

2.

Youth of color and 2S/LGBTQ+ youth across California face persistent challenges due to systematic and systemic underinvestment in their communities

3.

Youth are leaders, decision-makers, and drivers of community change

External Factors. Level of support from decision-makers to implement proposed recommendations for policy, systems, and environmental change; private and public infrastructure to support and sustain the work past the grant cycle.

Elevate Youth California Logic Model

Inputs

Participant level

- Department of Health Care Services staff and resources
- The Center staff
- Youth Education Prevention, Early Intervention and Treatment Account (YEPEITA) funding
- Evidence-based, innovative, and community-defined prevention practices
- Cohort-based support model with three tracks (Standard 36 months, Innovation 33 months, and Capacity Building 30 months)

Activities

Social Justice Youth Programming

- Civic engagement related to substance use issues or their root causes
- Leadership development through youth-led community programming
- Mentorship/relationship-building between peers and adults

Substance Use Prevention Education, Services, and Supports

- Substance use prevention and early intervention, outreach, and training
- Providing and/or expanding access to resources, supports, or services that meet youths' individual needs

Funded partner level

- Organizational capacity-building activities by funded partners
- Training and technical assistance that supports the key areas of EYC programming by The Center and subcontractors (e.g., webinar on civic engagement, narrative change)

Community level

- Develop, enhance and/or expand key partnerships that contribute to EYC's collective goals and objectives

Outputs

The number of youth ...
- Participating in civic engagement program activities
- Leading cultural or community program activities
- Connected to a formal mentor or supportive relationship within the program
- Participating in substance use prevention and early intervention programmatic activities
- Connected to basic needs or other resources, supports, or services provided by the program or program partners

- Number of staff trainings or resources on relevant topics by funded partners
- Number of training and technical assistance hours partners participated in

- Number of new organizational partnerships that contribute towards the collective goals of EYC and promote narrative change

Outcomes

Short-term

- Increased participation of youth in EYC programming
- Increased knowledge in civic engagement, policymaking process and public officials among youth
- Increased number of youth who perceived themselves as being more empowered and confident
- Increased number of youth who have at least one stable, caring relationship with an adult/older youth mentor or peer
- Increased number of youth who understand that substance use is harmful
- Decreased number of youth who report a favorable attitude toward substance use

- Increased knowledge among staff of funded partners of relevant topics regarding organization capacity and sustainability

- Increased awareness of substance use issues and youth-led solutions among organizations, decision-makers, or community members
- Increased level of collaboration among partners to address substance use, its root causes, and harmful narratives

Intermediate

- Sustained engagement of youth in EYC programming
- Increased demonstrated ability to present on and engage in justice and equity issues—locally and beyond
- Increased demonstration of personal and collective agency through connection to the community
- Increased agency in determining future pathways
- Increased ability to develop and sustain positive relationships
- Increased healthy behaviors among youth

- Enhanced finance operations; staff development, retention, and capacity; youth voice programming; and data skills among funded partner staff
- Increased amount of EYC partners receiving funding from a variety of sources

- Increased number of organizations, decision-makers or community members who seek to address substance use, its root causes, and harmful narratives

Long-term impacts

Community- and policy-level

- Sustained community capacity for civic engagement and organizing amongst youth and communities disproportionately impacted by the war on drugs
- Sustained policy support for continuous funding

↓

- Policy, system, and environmental changes to increase protective factors (e.g., safe spaces, resources, support systems, community belonging) or reduce harms and risk associated with substance use
- Reduced substance use disorder and substance use initiation among youth
- Reduced substance use disparities among Black, Indigenous, and youth of color
- Positive shifts in narratives about youth most impacted by the war on drugs

↑

Grassroots-level

- Sustained capacity of grassroots and emerging organizations to implement substance use prevention programs

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Definitions. Assumptions – Beliefs, groundings, and contextual factors on which the work is premised; **External Factors** – Contextual factors that could influence the program; **Inputs** – investments into the program; **Activities** – Actions undertaken by funded partners; **Outputs** – Direct products/results of activities; **Short-term outcomes** – Changes expected to occur in a 1-year timeframe, including change in knowledge or attitudes; **Intermediate outcomes** – Changes expected to occur in a 2- to 3-year timeframe, including change in skills or behavior; **Long-term impact** – Results expected after the conclusion of project funding.
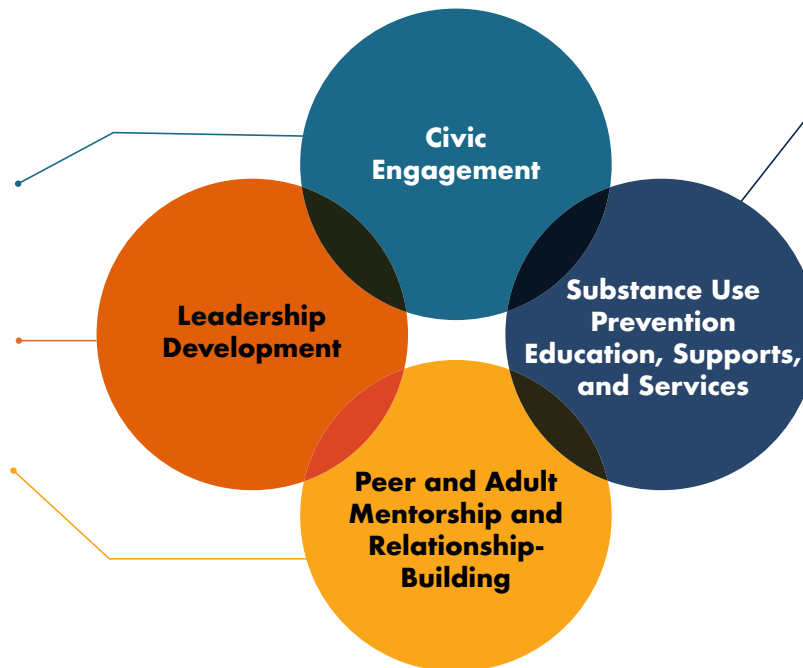
THE CENTER
at Sierra Health Foundation

HCS
CALIFORNIA DEPARTMENT OF
HEALTH CARE SERVICES

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Elevate Youth California Logic Model | Examples of Funded Partner Activities

As part of the Elevate Youth California model, funded partners implement a variety of activities that incorporate social justice youth programming and include education, services, and supports. Specifically, funded partners: 1) implement culturally responsive activities grounded in harm reduction trauma-informed care, 2) have competencies and/or receive training and technical assistance to support building relevant competencies around key areas of EYC programming, and 3) use listening sessions to modify the program based on youth experiences. Examples of program activities undertaken by Elevate Youth California funded partners in both social justice youth programming and education, services, and supports follow below.

Social Justice Youth Programming

- **Civic engagement** related to substance use issues or their root causes such as: *participation in local youth advisory boards or coalitions; engagement and substance use prevention education of public officials.*

- **Leadership development** through youth-led community programming such as: *public speaking, developing multi-media campaigns for community action, or training sessions.*

- **Mentorship/relationship-building between peers and adults** that support *establishing at least one stable, caring relationship with an adult/older youth mentor; cultural peers engaging with youth to foster an environment of inclusiveness and belonging.*
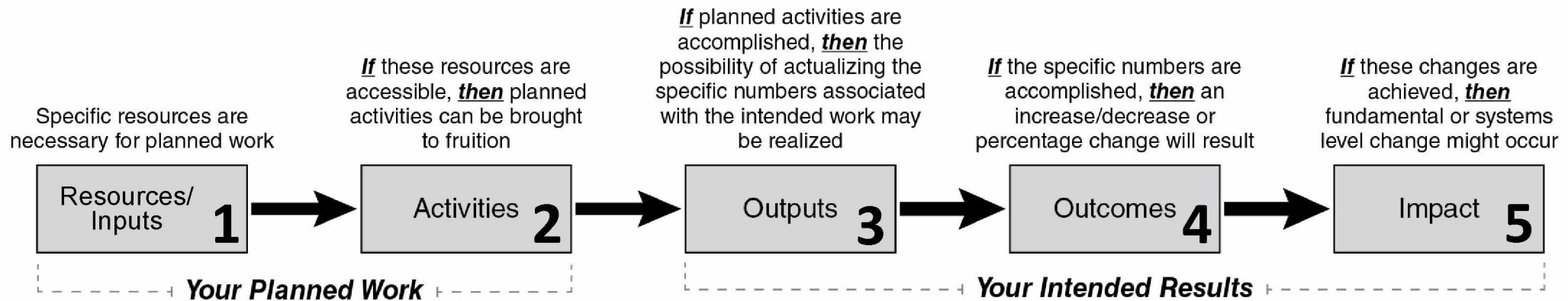
Civic Engagement

Leadership Development

Substance Use Prevention Education, Supports, and Services

Peer and Adult Mentorship and Relationship-Building

Substance Use Prevention Education, Services and Supports

- **Substance use prevention and early intervention outreach, education, and training activities,** such as *substance use prevention education campaigns or programs, outreach, alcohol and drug free social and recreational events.*

- **Providing and/or expanding access to resources, supports, or services that meet youths' individual needs,** such as *providing comprehensive support with resources and referrals for wraparound services (e.g., health care, housing, food, transportation, behavioral health services, education, job training) to help youth meet their basic needs.*

LOGIC MODEL

If planned activities are accomplished, **then** the possibility of actualizing the specific numbers associated with the intended work may be realized

If these resources are accessible, **then** planned activities can be brought to fruition

If the specific numbers are accomplished, **then** an increase/decrease or percentage change will result

If these changes are achieved, **then** fundamental or systems level change might occur

Specific resources are necessary for planned work

| Resources/Inputs **1** | → | Activities **2** | → | Outputs **3** | → | Outcomes **4** | → | Impact **5** |

Your Planned Work

Your Intended Results

Madden, 2018

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WHAT IS A LOGIC MODEL?

➤ A visual representation of a pathway.

➤ A diagram that specifies the steps from having a vision to long-term outcomes.

➤ A model that links the building blocks of a process from start to finish.

➤ An action tool to support program design, implementation and evaluation.

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WHY USE A LOGIC MODEL?

➤ To think through and communicate the objectives and strategies.

➤ To consider the sequence and logic of a process.

➤ To clarify assumptions.

➤ To consider needed resources.

➤ To align vision and objectives to reality.

LOGIC MODELS ALIGN WITH STRATEGIC PLANNING

➤ Prioritizes and organizes strategic investments.

➤ Avoids strategic mistakes.

➤ Promotes comprehensive, integrated, collaborative strategic implementation.

➤ Gets stakeholders on the same page about objectives, strategy and priorities.

➤ Creates a guide for ongoing course correction.

SPECIFIC USES

➤ for planning

➤ to maximize resource use

➤ to engage community/stakeholder input

➤ for external communication

➤ for evaluation

➤ to raise funds

OUTPUTS | OUTCOMES | IMPACT

➤ Outputs

    ➤ the direct products of your activities

    ➤ "units" of activity

➤ Outcomes

    ➤ the changes observed in your targets

    ➤ what is different due to the activity?

    ➤ can be measured in percent (%) change

➤ Impact

    ➤ fundamental results

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QUICK CHECK

https://www.surveymonkey.com/r/Logic_Model

LOGIC MODEL EXERCISE

Link to Mural Board with Logic Model

https://app.mural.co/t/sass4098407/m/
sass4098407/1737003470034/1bebbd78eee78fef16
61e42ce5fafcf12ab81b32?
sender=ubc39c30ef00bed36831b3485

START A LOGIC MODEL

For your work… focusing on activities and outputs.

Inputs	Activities	Outputs	Outcomes	Impact

MURAL BOARDS FROM TODAY

➤ **Problem Tree Analysis** — https://app.mural.co/t/sass4098407/m/ sass4098407/1737005800875/6d0ea9fb386552933e1a3027f609a06731d507a6? sender=ubc39c30ef00bed36831b3485

➤ **Logic Model** — https://app.mural.co/t/sass4098407/m/ sass4098407/1737003470034/1bebbd78eee78fef1661e42ce5fafcf12ab81b32? sender=ubc39c30ef00bed36831b3485

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Next in the Capacity Building Training Series

10:00 a.m. to 11:30 a.m.

Thursday, February 20, 2025 — Planning your Work, Working your Plan

Thank You!
Dr. Jennifer R. Madden

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