



Leadership Goal Setting Getting SMART—O About Your Goals

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There's a lovely line in Seneca's writings: "If a person knows not what harbor she or he seeks, any wind is the right wind." [1st ct., common era] This is akin to the more modern phrasing, "If you don't know where you're going, any path will take you there."

Setting goals is among our most commonplace of our activities. Not always, but much of the time, we readily fulfill our desires with satisfaction. Our intentions get the results we're after. This is easier, however, for individuals than for groups. It's harder to get clear about what **we** want and often even harder to work out how **we** are going to act on our shared ambitions. Too often goals within a congregation don't get met, resulting in fault-find blaming that saps the goodwill out of our efforts.

My purpose here is to remind the reader of some guidelines for anyone who is trying to set goals, individually or with others. An activity sheet for practice follows at the end.



‡ **Principled-Goal Setting:** As a people of faith, we Unitarian Universalists ought ideally to plan according to our purpose. The first tip for congregational leaders' goal setting is to ask: ***Is this proposal in keeping with our mission as a Unitarian Universalist congregation?***

Some years ago, my congregation's board turned down a "casino-night" fund-raising event after one board member asked, "We have a strong alcohol use policy so as not to present temptation to any member. Can we assume there is no one among us for whom gambling is an addiction?" Any goal we set ought to reflect the highest ambitions of our Unitarian Universalist principles.

Additionally, we must say: ***not all goals are created equal.*** There are some things we want to achieve that take priority. The leadership team is obligated to make the case for why one goal is more important or urgent than another and to see that institutional resources do not get diluted in pursuit of too many goals at once.¹

¹ Few things defeat congregational goal work more than two seductions: a) letting the urgent drive out the important, and b) trying to do too much. I've counseled leaders over and again, "Do fewer things better." Were it so.

‡ **Do What Matters, Not Just What Sounds Right:** We're all subject to the appeal of the next-great thing or what will impress somebody else. Too often congregational leaders set themselves up for failure by agreeing to do something because a strong-willed member or a group with significant money press or even our own Unitarian Universalist Association press them to do so. But their hearts are often not in it. Lackadaisical outcomes result.

Real goals take courage if we are to suffer our way through resistance, sabotage, and disappointment until success is achieved. We won't put out the effort needed if we're only trying to please someone else. Effective goals require our hearts to be in them. They must matter to us.

‡ **Be Positive; Use "Start" Goals More Than "Stop" Goals.** It is beyond my scope here, but suffice it to say the human brain does not pay attention well to "not."² Often goals reflect some pain or dissatisfaction we're trying to relieve. Such desires, to illustrate, get expressed as "We must stop the sniping e-mails between members."

Better to structure our goals in terms of what we're after rather than what we are quitting. Recast a problem into a challenge. For instance, change "Don't run in the street!" to, "Stay on the sidewalk." Instead of "Don't overspend your budget," say, "All committees will adhere to their spending guidelines."

There are times, though, when we simply want to stop something. That's ok. But every "stop" goal needs a corresponding "start" goal. For instance, "I'm going to cut my calories to lose 10 pounds in two months, helped along with going to the gym at least three days a week."

This is particularly important with staff performance. Tell people what you want, not what you don't want. "Reverend, your sermons are not inspiring" gives the minister nothing to work with. Say instead, "I'd like you to speak more from your own experience with the questions you ask us to think about." It helps the staff know where to go in order to succeed rather than simply how to avoid trouble.



Introducing the S.M.A.R.T.-O. framework.³ Here are six tests to help you move beyond good intentions to meaningful goal setting. A goal is a goal when it is:

Specific	Attainable	Timely
Measurable	Realistic	Owned

S**pecific.** A goal is a goal when it is easily and clearly understood. Unitarian Universalists seem to like waffle words such as "encourage," "strive" and "endeavor" that leave one guessing as to what they really mean. A goal is specific when you know what the finish line looks like, you can name the steps it will require for you to get there, and when it's going to happen.

A vague goal would be sound like "We're going to grow the congregation this year." A more specific goal would be: "We're going to host a newcomer's party and place advertising on public radio."

² There is a subliminal quality to active goal work which may be why we have encourage posters and the like. Child psychologist Haim Ginott was especially known for his advice to parents along this order: Tell the child what you want and you're more likely to get it.

³ Many people have written about goal setting, but I've adapted this model after the work of psychologist Dr. Gregory Frost, "The SMART Way to Set Goals."

M **asurable.** Often our goals are unclear because we use qualitative rather than quantitative descriptions. “I want our members to be more involved.” is not objectively measurable. Better to say: “We will involve 30% of our membership in adult programs, September to May.” If you can count it, it’s more likely to be measurable.⁴

Think of goals as akin to experiments — you’re going to try something to see what happens. As part of your measuring, you need also both a start [T_1] and an end time [T_2] to monitor your progress.

A **ttainable.** Call this the *shooting for the moon* problem. Many congregations posit “growing by 200 new members in the next ten months.” That’s specific and measurable, but can it be done? For a congregation that has never taken in more than 5 or 10 new members in a year, this may yet be possible but it is not likely. A goal has to pass the smell test: *Can it be achieved with the time and resources at hand?* Without a rocket, I’m not going to the moon. However, with a bicycle, I can drive across town.

R **ealistic.** It’s not realistic to double your membership in a year. However, you can discern reasonable incremental changes that, say in five years, could double your membership.

Consider a common mistake many stewardship campaigns make when they ask for a 25% increase in giving over the last year. If the economy is in a downturn, if typical compensation rewards are barely keeping even with inflation, this is simply unrealistic and the membership will rightly discount the request when pledge time comes.

Realistic goals are also plausible and believable. Our goals must be credible if people are to sign onto them.

T **imely.** Timely has two meanings here: One, we time when things are going to happen, saying “we’ll acquire the new RE curriculum in the next month” versus “we need a better RE program.” Deadlines keep you honest and on your toes. As goals must be assessed, you need that T_1 *start* and T_2 *end* time to keep track of how well you’re doing. That T_2 date also gives a sense of urgency to your goal.

Secondly, timely is also about readiness. Launching a capital campaign just after a ministerial transition or after a national crisis does not bode well for a good outcome. Expanding to two services after you’ve filled 80% of your seating for a year, all else being equal, is probably a timely idea.

Lastly, a goal must be:

O **wned.** This is the lynchpin of goal setting. Unless someone’s name is attached to it, it is not a goal. What’s that old saw, “The job was simple enough anybody could do it. Everybody thought somebody would. So nobody did.”

⁴ I will be among the first who will wail if Unitarian Universalists reduce effective ministry to mere number crunching. If “life is just a chance to grow a soul,” as the great A. Powell Davies once opined, or if our purpose is to nurture the spirit and heal some portion of the world, no one thing is going to achieve that. Those are very hard to measure. But that should not stop us from trying to think what would at least infer success in at those goals.

Likewise, what we measure matters and we must guard valuing something just because it is readily measured. Counting the right things poorly is still better than tracking the wrong things with great accuracy.

To illustrate a middle position: If more members report they are finding satisfaction in worship or in their congregational relationships this year than last, it is reasonable to conclude overall we are doing the right things and should stay on course. If the contrary is reported, then that, too, tells us something about future goal setting. Either way, we can yet identify measurable actions to move us along.

Every goal in congregational life has to have an identifiable human being who has accepted the responsibility to bird-dog it, to track it, to see that progress is being made, to report outcomes, and to help leadership revise the goal as obstacles are met or overcome.

Meet the first five criteria, give a named owner, you've got a goal.



‡ **Goal Setting as a Learning & Assessment Tool:** Many goals are of a *technical* nature. We can clearly say what needs doing, we can identify and obtain the resources required, and we can assign someone to implement the goal by a certain date. At time T_2 , it either is or is not done.

Other goals, however, **require learning something about ourselves or our world** before we can come up with action steps. Something in us needs to change. Consider launching a new small group ministry program. It is fairly easy to identify the technical requirements — a curriculum, training facilitators, etc. However, how would you introduce the idea to the membership? Is there any membership interest? Where will you find capable facilitators? How many small groups can this congregation sustain and for how long?

It is this **adaptive quality** to goal setting that leads me to argue for **goal assessment** rather than program or performance evaluations. Evaluations presuppose a standard against which judgement can be made.

Evaluations offer varying degrees of approval or disapproval. They bless or curse but fail to teach.

By contrast, when we **assess** something we ask: *It was our intention to do this action, what happened?* If the goal was met, a new question arises: *What shall we do next?* If a goal is not met, we can ask: *What did we learn from our disappointment? Were we realistic? Was the goal attainable? Did we have the right tools, etc.?* **Adaptive goals** are often like that. There are surprises or discoveries that thwart technical success.

Then a new question arises: *Ok, that did not work as planned, do we still want to do this? If so, how shall we reframe the goal for the next time period, what changes in the goal do we need to make?*

In this way, goal-planning becomes future-oriented rather than retrospective. It moves from judgement to a routine, non-blaming part of the shared ministry.

‡ **Which Leads to One Last Tip:** It is my experience, along with too many goals, is that we plan only on an annual basis. I suggest instead a rotating cycle of 3, 6, and 9 month goals.

Three-month goals are typically technical in nature, of the “git-er dun” type. After 3 months, they should easily come off a check list as accomplished.

Six-month goals are more adaptive; someone has to study a problem and come back with the technical steps. Ideally, after three months, the six-month goal has become clear enough that we can predict its fulfillment in the next three months, again coming off the goal list after that time.

Nine-month goals are of a “let’s create a problem for ourselves” sort. These are our bigger dreams about which there is much to be learn. Take the idea of going to two services. It sounds like a technical issue, but the cultural norms and membership attendance patterns need to be well understood before you try to implement such a change. Where 3 and 6 month goals can readily be assigned to a staff person or a committee, 9 month goals are best served by a dedicated task force approach.

With this cycle, a Board of Trustees can keep track of its ambitions, diminish the frequency of unplanned urgencies throwing you off course. Moreover, it makes accountable planning part of the congregational culture as we move ever forward to greater excellence in our ministries.

A Goal Planning Worksheet. Consider answering the questions below for each goal your leadership team wants to adopt:

Give your goal a short name: _____

- Is it in keeping with our Unitarian Universalist ideals and values?
- Do we really want to do this?
- Is it framed in a positive way?

Specificity:

- Can you make a list of steps you will take to implement the goal?
- Can you now say why this goal is important enough it needs to be put forward?
- Review your action steps, would anyone reading them know exactly what you propose to do?

Measurability:

- What will you point to in order to indicate you've accomplished the goal?
- What do you need to test as a plausible outcome?
- When will you get there?

Attainability:

- Can we really do this?
- Do we have the resources at hand? Or, can we get them?
- What obstacles might we need to be overcome?

Reality Check:

- Does this goal make sense for our congregation?
- Is it consistent with our skills and resources?
- Will the membership support it? Do we need to "sell" this idea? Whose support do we need?

Timeliness:

- Do we have a schedule for implementation, assessment, and reporting?
- When do we expect the goal to be met? What exact dates are noted for interim and final reports on progress?
- Are there any compelling reasons to suggest this is a good or not so good time to act?

Ownership:

- What person or group will carry the responsibility for acting on the goal?
- Who will monitor or supervise that effort?
- Who needs to be held accountable for results?

Please let me know what you learn about goal setting and how this note might be improved. Good luck with your efforts. May you have an attractive harbor and fair winds.

Rev Kenn