***[\*\*\*To get your own editable copy of this template, click here.\*\*\*](https://docs.google.com/document/d/1kPHFuuDudpRDhdo7zr7O52oENmf1kQRQpwxdqwnrkZc/copy)***

Sample Organizational Goal Development Steps

These sample goal development steps serve as a guide for your organization’s own goal-setting process. The exact steps, dates, and duration for each phase will depend on your organization’s size, its previous experience with setting goals, and the existence, if any, of a longer-term strategic plan that sets out priorities. If this sample is too lengthy and intensive for your current needs, pare it down to align with your context.

The example here assumes an organization operating on a calendar year cycle: January 1 to December 31.

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| **Steps** | **Description** | **Owner** | **Date** |
| **1. Set timeline** | Draft rough timeline for setting next year’s goals (aligning them with budget cycle and performance evaluations) and share with senior management team. | Executive Director  *(or senior leader responsible for the process)* | Aug 20 |
| **2. Identify organizational priorities based on broad strategic direction** | In one meeting or more, ED and department heads discuss and ultimately agree on a list of initiatives and areas of focus for the coming year, and identify high-level implications for each department.  *This phase may be substantially shortened or skipped if your organization has an existing strategic direction or plan (formal or informal) from which it can easily derive the upcoming year’s priorities.* | Executive Director  *(or senior leader responsible for the process)* | Sept 10 - 20 |
| **3. Develop departmental goals and plans** | With organizational priorities in mind, reflect on past year’s progress and identify potential areas of focus for the year ahead. | Department Heads | Sept 25 |
| Meet individually with ED to discuss department’s prior year progress, lessons learned, and next year’s goals. | Sept 28 – Oct 10 |
| Draft [SMARTIE goals](https://www.managementcenter.org/resources/smartie-goals-worksheet/), making sure to 1) get input from team members and 2) check that goals are backed up by plans. Send draft to ED. |  | Sept 28 – Oct 10 |
| Draft goals and plans for any areas for which ED is directly responsible. | Executive Director | Oct 20 |
| Meet with ED to review draft goals and plans. | Department Heads | Oct 25 – Nov 5 |
| Make revisions and send final version to ED. | Nov 7 |
| **4. Finalize key organizational goals** | Pull from departmental and ED goals to create [summary goals document](https://www.managementcenter.org/resources/sample-organizational-goals/), reflecting key areas of organizational focus for the year ahead. Ensure key goals collectively add up to desired organizational progress toward strategic direction. | Executive Director  *(or senior leader responsible for the process)* | Nov 10 |
| Discuss proposed final draft of org goals with board of directors. Board approves final draft (as is or with changes). | Dec 1 |
| **5. Roll out organizational and team goals** | Convene full staff for meeting to discuss goals for the year ahead (with 1-pager version of organization’s key goals distributed in hard copy for easy posting and reference). | Executive Director  *(or senior leader responsible for the process)* | Dec 5 |
| **6. Set individual goals** | Support staff to draft individual goals and short-term work plans based on departmental goals and action plans. | Department Heads | No 15 - 30 |
| Meet with individual staff to refine individual goals and ensure teams collectively cover areas of departmental responsibility. | Dec 3 - 13 |