

A complex, multi-level wireframe architectural structure is rendered in a light grey color. It consists of various rectangular and hexagonal frames stacked and connected in a way that suggests a modern building or a series of interconnected platforms. The structure is set against a background of blue and white light trails that create a sense of motion and depth. A dark red vertical line runs down the left side of the page, and a dark red horizontal line runs across the middle, intersecting the text.

PLANNING

RESOURCES



Categorize Goals Areas

Finalize the goal area list separating out the organizationally “strategic” from the departmentally “tactical”.

Strategic	Tactical

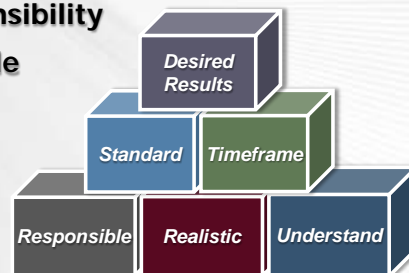
Developing Goals Statements

Be sure each goal meets the following six criteria.

1. **Desired Result.** These are strategic initiatives or key issues which were defined in the strategic business planning process. Please refer to the planning retreat results for the list of key issues or strategic initiatives. Every goal statement should link back to a key issue.
2. **Norm or Standard for Judging Success.** How will the organization know whether or not the goal has been accomplished? The standard of measurement answers the questions of quantity. Therefore, the standard of measurement must be quantifiable. Results answer the following questions: How much? How many? How often? etc. One effective tool if you get stuck is to insert the phrase “as measured by” into the statement as we have done in the example on the next page.
3. **Deadline Date.** The goal should be reached in a reasonable amount of time. It is more effective to set the date for the last day of any month rather than the first day as it creates a heightened sense of urgency.
4. **Person Responsible.** Only one person should be responsible for overseeing goal achievement. We recommend that position rather than name be used to list this person in the event that a new person moves into the position before the goal is completed. It is very important to remember that this person is not necessarily the person who will be doing most of the work. Rather, this person is the “champion” or leader of the goal and is responsible for seeing the goal to completion.
5. **Realistic.** The goal should not be a “pie in the sky” or a “dream.” Rather, it should be realistic and attainable given the external environment and the internal resources available. If goals are unrealistic and never accomplished, the resulting effect is a demoralization of the entire organization.
6. **Understandable.** Goals should make sense. They should be easy to read. If a goal is complicated or unclear, then it will not be accomplished. Straight forward, concise, and easy to understand language should be used. One-sentence goals of 20 words or less are best.

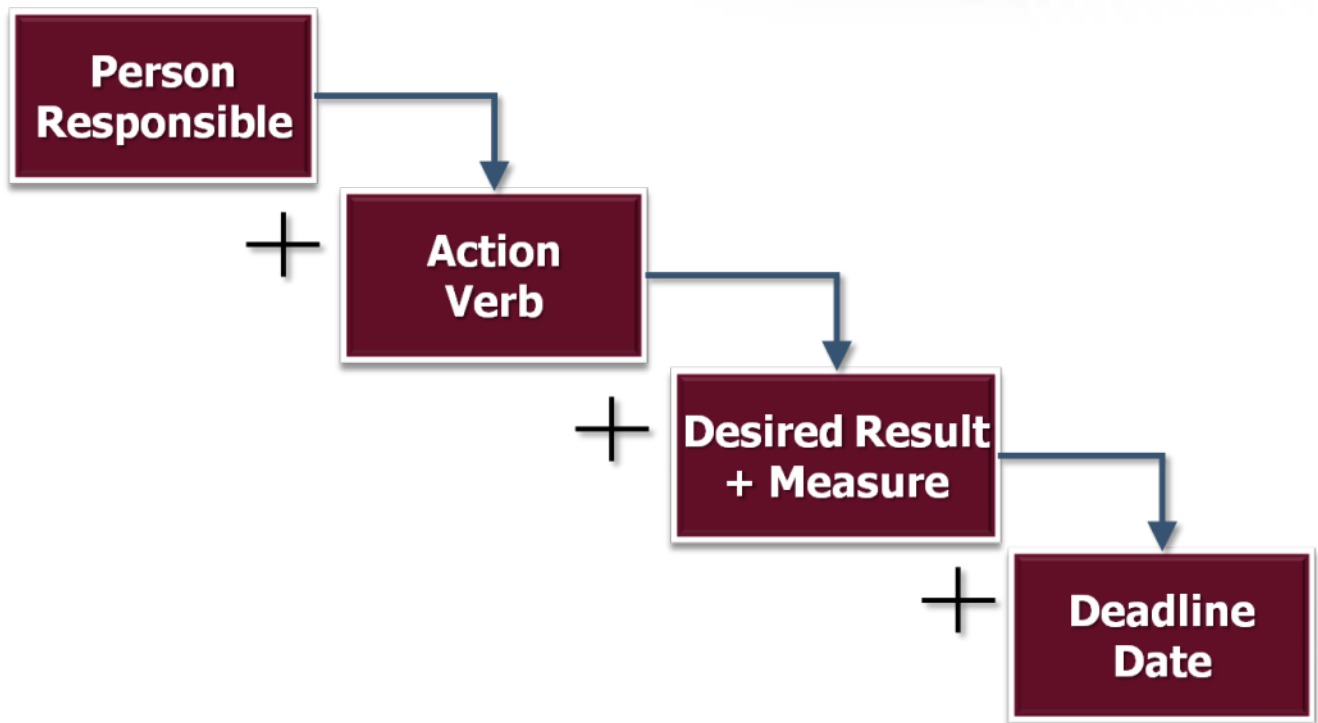
Six Characteristics of a Measurable Goal

1. Written in terms of desired results or outcomes
2. Has a norm or standard for judging success (measure)
3. Has a specific time framework or deadline
4. Assigns general responsibility
5. Is realistic or attainable
6. Is understandable



Developing Goals Statements

As desired, follow this process for writing your goals.



Sample Goal - Determining the Components

The VP of Lending will enhance the timely delivery of loans by re-engineering credit union processes as measured by closing 75% of consumer (non real estate) loans taken through the phone branch delivered within 24 hours by **12/31/06**.

Person Responsible	Action Verb	Desired Result	Norm or Standard	Deadline Date
The VP of Lending	will enhance	the timely delivery by re-engineering credit union processes	as measured by closing seventy five percent (75%) of consumer (non real estate) loans taken through the phone branch delivered within 24 hours	by 12/31/06.

Developing Action Plans

Sample Action Plan:

GOAL # 06-03					
The VP of Lending will enhance the timely delivery of loans by re-engineering the process to close seventy five percent (75%) of consumer (non real estate) loans taken through the phone branch delivered within 24 hours, by 12/31/06.					
Item Num.	Action Step	Person 1	Person 2	Start Date	Finish Date
06-07.01	Build cross functional team	VP Lending	VP / HR	1/24/06	2/7/06
06-07.02	Schedule team meetings	VP Lending		2/7/06	2/14/06
06-07.03	Map existing processes	Team Leader		2/21/06	3/7/06
06-07.04	Measure loan application receipt process	Loan Officer		3/7/06	3/28/06
06-07.05	Measure flow of documentation	Loan Clerk		3/7/06	3/28/06
06-07.06	Measure application review	Loan Officer		3/7/06	3/28/06
06-07.07	Measure loan approval process	Loan Officer		3/7/06	3/28/06
06-07.08	Measure documentation of loan minutes	Loan Clerk		3/7/06	3/28/06
06-07.09	Measure inputting loan on computer and cutting checks	Loan Clerk		3/7/06	3/28/06
06-07.10	Measure filing process	Loan Clerk		3/7/06	3/28/06
06-07.11	Measure contacting of member re: loan approval	Loan Officer		3/7/06	3/28/06
06-07.12	Brainstorm and identify factors which impact process	Team Leader	Loan Officer	3/28/06	4/4/06
06-07.13	Determine why we do each process	Team Leader		4/4/06	4/11/06
06-07.14	Evaluate the usefulness of each process	Team Leader	Loan Officer	4/4/06	4/11/06
	Etc...				

FILM Measurement

Financial

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Internal

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Learning

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Membership

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