What you’ll learn:

- The benefits of setting goals as a chapter
- How to set S.M.A.R.T (specific, measurable, action-oriented, realistic and timely) goals
- How to write an action plan to make sure your chapter meets its goals

Goal setting is central to a successful chapter, but it is one of the more challenging and overlooked tasks for student organizations. Setting goals helps you to: define your chapter, give the group direction, and set you up for success.

What is Goal Setting?
Goal setting is a collaborative process your chapter can undertake to figure out what you should focus on both in the short- and long-term. You can think about setting internal goals (e.g. working on the communication structures within your chapter, increasing the number of members interested in leadership positions), and external goals (e.g. reaching a certain number of people, holding a certain number of outreach events on campus). You can divide the goals you want to set by area or topic such as membership, programming, or fundraising. The ultimate objective is to develop an action plan your chapter is excited about and invested in for the semester or school year ahead and build a leadership team that is committed to following through and executing it. Learn more in Building a Leadership Team.

Why Set Goals?

Goals:

- Give direction to your chapter
- Allow you to plan ahead and be prepared
- Provide a basis for recognizing chapter successes and accomplishments
- Motivate chapter members
- Help delegate responsibility within your chapter
- Make evaluation easier and more valid
- Are the first step to developing tactics: the specific actions your chapter will take

Goals should be S.M.A.R.T
Once goals are set, put them through the S.M.A.R.T. test – ask yourself if your goals meet each of these criteria:

- **Specific** – Goals should pinpoint specific things.
- **Measurable** – You should be able to know when you reach a goal.
- **Action-oriented** – You should be able to break a goal down into discrete tasks.
- **Realistic** – You should have the resources, time and manpower you’ll need to achieve goals.
- **Timely** – You should set timelines and deadlines for goals to be met and hold the group accountable.

Goal Setting Process

Things to keep in mind:

- Goal setting is an ongoing process: you should begin as soon as possible. If you choose to engage in goal setting at the end of the previous semester or school year, it’s helpful to have the new
president and leadership board in place at that time. Be sure to check in throughout the year to
gauge your chapter’s progress. You can plan for either the semester or the entire year – whichever
seems more manageable.

- Goals should be set as a group with the entire chapter leadership, including your advisor. Make
  sure everyone’s ideas are represented and that you have consensus or majority rule on goals and
  action steps. This is crucial to ensure commitment and motivation for achieving goals. If your
  members disagree with the direction and goals that are set for the chapter, they have little
  incentive to complete the tasks that need to be done to accomplish the goal.

Before you begin:

- Schedule a board retreat or special meeting specifically for the goal-setting exercise. Make sure
  you allow plenty of time to get through the following goal setting exercise and take breaks if
  necessary.
- Reserve space and have all the materials you need (large chart paper, markers, food, etc).
- Goal setting should be a fun and exciting process! Make sure to get your chapter members pumped
  up about creating the road map you will all take as a chapter together. To kick things off, start with
  an icebreaker or short team-building activity. See Building a Leadership Team.

Steps to Effective Goal Setting
These are the basic steps you and your chapter should take to come up with your goals for the school year
or semester ahead:

1. Brainstorm a list of potential ideas of what the chapter would like to achieve.
   - Appoint a note taker and a moderator from the group to lead the brainstorming session.
   - It may be helpful to break the brainstorming down into categories (e.g. membership,
     programs/events, meetings, marketing/publicity, leadership, and advocacy) and set a time limit for
     each category to make sure everything gets discussed in a timely manner.
   - Start by asking what the group would like to see your chapter accomplish. Ideas can turn into goals,
     so allow people to say whatever comes to mind. No idea is too big, small, or silly to make the list.
   - Every member should take part in the brainstorming to make sure all perspectives are included.
     This is important for chapter morale, cohesion, and willingness to participate.

2. Prioritize.
   - Now that you have a long list of ideas, you must narrow it down to those you will adopt as goals for
     your chapter. This can be difficult, but it is crucial to the success of any goal-setting exercise.
   - Remind your chapter of the Active Minds mission. Your chapter’s goals should reflect the four main
     objectives of all chapters which are to:
     - Increase students’ awareness of mental health issues
     - Provide information about resources regarding mental health and mental illness
     - Encourage students to seek help as soon as it’s needed
     - Serve as liaison between students and the mental health community
   - Have each member rank their top few goals and share why they chose them.
   - As a group, rate goals in order of importance.
   - Remind everyone that goals must be realistic and achievable.
• Narrow the list down to 1-3 S.M.A.R.T. goals.

After you’ve agreed on the goals you are adopting for your chapter, come up with the steps you need to take in order to reach this goal. Some goals may only require a few steps, and some will have several. The important thing is to be as specific as possible. Under each step, think about what tasks you need to complete in order to accomplish that step. See Appendix: Example Action Plan for a great sample.

Consider the following as you create your Action Plan:
• What are the steps you must take to accomplish your goal?
• What resources (people, money and materials) will help you accomplish each step?
• Who is responsible for completing the tasks under each step?
• What should the deadline be for accomplishing each step?
• What will the outcome of accomplishing each step be?

For help with incorporating fundraising into action planning, see the Chapter Fundraising Planning Guide.

4. Evaluate.
Evaluation is crucial in figuring out whether chapter goals have been met. Evaluation also allows your chapter to re-visit your original goals to see if they still reflect the direction in which the chapter wants to move. If reaching the goals you originally set has proven challenging, evaluation is also a time to recognize the obstacles that have gotten in the way and revise the action plan as necessary. See Evaluation for more on how to evaluate your chapter goals.

Adapted from the University of Florida Leadership Education and Development (LEAD) Team and the University of Kentucky Office of Student Activities, Leadership & Involvement.