



# *Stronger Economies Together*

Strategies for Building New Economic Opportunities

Module Four: Developing Your Vision and Goals

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## *Module Four: Developing Your Vision and Goals*

This instructor's guide outlines the content, activities and handouts that should be used to teach this section. Refer to this document for detailed guidance on how to deliver this module.

### **Using the *Participants' Guide***

The *Participants' Guide* contains handouts designed to assist participants in planning their economic development effort.

### **Group Exercises**

There are a number of group exercises in this module. Do each exercise – they not only help the participants understand the materials, but also provide a break from listening to the presenter while allowing the participants to get to know each other.

A summary of the group discussions and exercises:

- Slide 10: Steps in Building a Vision Statement (Handouts One and Two)
- Slide 13: Let's Brainstorm Some Ideas
- Slide 16: SMART Goals (Handout Three)
- Slide 21: Organizational Goal Worksheet (Handout Four)
- Slide 22: Final Reflections





## References

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McNamara, C. (2007). Basics of developing mission, vision and values statements. Adapted from the *Field Guide to Nonprofit Strategic Planning and Facilitation*. Minneapolis: MN: Authenticity Consulting. Retrieved from [http://managementhelp.org/plan\\_dec/str\\_plan/stmnts.htm](http://managementhelp.org/plan_dec/str_plan/stmnts.htm)

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Whitney, D. & Trosten-Bloom, A. (2010). *The power of appreciative inquiry: A practical guide to positive change* (2nd ed.). San Francisco, CA: Berrett-Koehler Publishers, Inc.

## *Instructions:*

Show this slide and indicate to the participants that Module Four will focus on creating a regional vision and key goals.

## *Script:*

“Our session today will address the important ingredients for creating a regional vision and your team’s major goals.

It’s pretty natural for groups to say something along these lines: ‘Why do we need to fuss with developing a regional vision? And what’s the big deal about defining regional goals?’ Both represent your team’s calling card – it communicates what your team is focused on achieving in the region.”



**Slide: 1**

**Time: 2 Minutes.** Have this slide showing as people enter the meeting room.



## Instructions:

Read the statements on this slide, and then ask the participants to share their reactions to the two statements. Can they identify with either (or both) of these statements? Call on a small number of people to share their thoughts.

## Script:

“I’d like to share with you a Japanese proverb that really hits at the heart of why having a vision is so crucial to the work of your regional team. The first portion of the proverb states:

‘Vision without action is a daydream’

I’m sure you’ve worked with people, or have served on committees, that have done a superb job of coming up with great ideas, but they struggle in getting things off the ground. They may be great thinkers, but they’re not great doers. Having a vision is great, but if you’re paralyzed in your ability to get things off the ground, then there is little hope you’ll ever achieve your vision. You are simply daydreaming.

Now, let’s look at the second portion:

‘Action without vision is a nightmare.’

Again, many of you have carried out activities but were frustrated because you didn’t know where these efforts were going or what they intended to achieve. Without a vision in place, it’s easy for your actions to lead to chaos. When that happens, you have a nightmare on your hands.”

## Something to Think About

**Vision without action is a daydream.**

**Action without vision is a nightmare.**

*Japanese Proverb*



Slide: 2

Time: 3 Minutes

## *Instructions:*

Briefly share what Module Four will cover.

## *Script:*

“We will focus on three main topics in this module. First, we will think through a vision. Next, we will examine the steps for building a strong vision statement for your region. Third, we will discuss the definition of a goal and guide you through the development of an organizational goal for your SET team.

If your team already has a vision statement AND/OR goals developed, our module will provide you with the opportunity to carefully assess whether they incorporate the crucial elements of strong vision and goal statements. If they don't, then you will have the opportunity to refine them as part of Module Four.”

### Outline of Module Four

- What's This Thing Called "Vision"?
- Features of a Strong Regional Vision Statement
  - Building a shared vision: A step-by-step process
- What's a Goal?
  - SMART Goals
  - Building an Organizational Goal



**Slide:** 3

**Time:** 2 Minutes

## Instructions:

Read the statement by Jonathan Swift about vision. Then, share with your participants the characteristics of a vision.

## Script:

“So what’s this thing we call vision? According to Jonathan Swift, it refers to the art of seeing the invisible.

A number of books written over the past several years highlight some of our nation’s most effective and successful public, private, and not-for-profit sector leaders. A common theme associated with many of these individuals is that they seem to be visionary – they see things that others oftentimes cannot see. Even in your own experiences, you may feel energized when you work with someone who seems to have a vision about the direction of his/her company, organization, or agency.

Some important characteristics of a vision:

- It focuses on the future – something that we hope to achieve someday in the region.
- It expresses the hopes, aspirations and dreams you have for the region.
- It delineates what you want your region to be – not so much now, but in years to come.”

### What’s This Thing Called “Vision”?

*Vision is the art of seeing the invisible*

Jonathan Swift

- Describes the future situation you want to achieve
- Responds to key questions:
  - What do you want your region to be?
  - What are your dreams for the region?



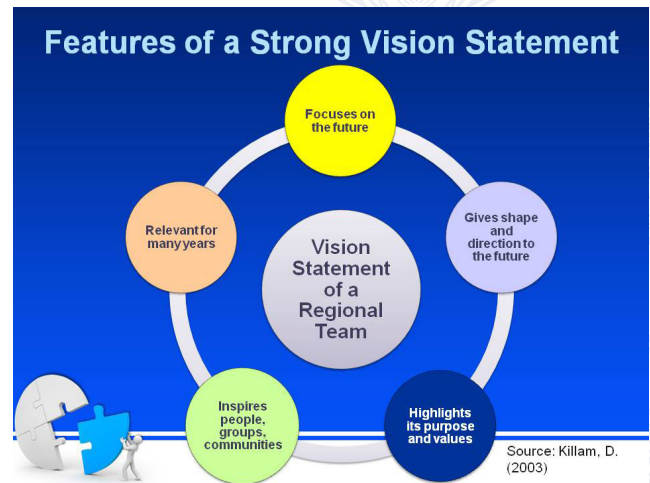
Slide: 4

Time: 2 Minutes



## Instructions:

Having discussed what we mean by a vision, the next step is to put that vision into words that provide local people, organizations, and communities with an understanding of the team's hopes and aspirations for the region. The slide identifies the various elements that should be incorporated into a strong vision statement. Don't worry if your participants struggle with this topic, as writing a strong regional vision statement is tough work. However, it's important for the team to prepare a vision statement.



Slide: 5

Time: 5 Minutes

Source: Killam, D. (2003). Vision, mission, goals and objectives . . . Oh my! Group Works: *Getting Things Done in Groups Bulletin (#6107)*. University of Maine Cooperative Extension, Orono, ME. Retrieved from <http://www.umext.maine.edu/onlinepubs/PDFpubs/6107.pdf>

## Script:

“Preparing a vision statement is not easy. It requires some careful thought and discussion on the part of your team and others. Fortunately, we have five core elements that should be captured in a vision statement noted in our slide. As you begin to develop a vision statement for your regional team – or consider ways to refine your existing vision statement – try to make sure the vision statement:

- Focuses on the future
- Gives attention to the nature and direction of the change you envision for the region
- Highlights the purpose of your efforts and includes the values to which you subscribe in the region
- Is written in such a way that it inspires people, groups and communities in your region
- Represents something that won't soon become outdated, as it remains relevant for many years

No doubt, it may seem difficult to incorporate all these dimensions into your vision statement, but it's important to try to capture as many of these components as possible.”

## Instructions:

This slide provides SET participants with a good roadmap for developing a vision statement. One important point to convey is that a vision statement is not something that should be developed in isolation from the people, groups and communities likely to be most impacted by the efforts of the regional team. Thus, it's important for the team to reach out to others in the region because they will want their vision statement to be one that others (outside of the team) have had some role in helping create.

Walk the team through the five steps of developing a vision statement. The key steps are noted in the green boxes. The gray boxes, located below each major step, provide additional information on completing that specific step.



**Slide:** 6

**Time:** 7 Minutes

**Source:** Mind Tools, LTD. (2011). Mission statements and vision statements. Unleashing the power of purpose. *Mind Tools, Essential Skills for an Excellent Career*. Retrieved from [http://www.mindtools.com/pages/article/newLDR\\_90.htm](http://www.mindtools.com/pages/article/newLDR_90.htm)

## Script:

“I’d like to walk you through the step-by-step process for developing a vision statement. Our slide highlights five important steps.

**Step 1:** Determine the central focus of your vision statement. For example, will the focus be on the economic vitality of the region, on efforts to build strong and lasting working relationships among local governments in the region, on advancing the region’s overall quality of life, or something else?

**Step 2:** Seek input from all members of the regional team, colleagues, local leaders and groups, and a diversity of residents. Ask them, ‘What are your future hopes and aspirations for this region with regard to \_\_\_\_\_ (insert the focus of your vision statement)?’

**Step 3:** Look for common themes and ideas from the inputs you’ve received. Study these inputs and prioritize the ideas/themes. As a team, decide which ones to retain and which ones to remove from the list if they don’t align with the team’s focus from Step 1.

**Step 4:** Take a stab at drafting a vision statement from the core ideas and themes you’ve retained. Remember to use the information contained in Slide 5 to help you in building your vision statement. When you feel you have a good draft of your

## Script (Cont.):

vision statement, share it with others. These could be the same groups or individuals you tapped in Step 2.

**Step 5:** Develop a polished version of your vision statement. Let this be something your team uses time and time again to inspire others to join or support your efforts in the region.”



**Slide:** 6 continued

**Time:** 7 Minutes

**Source:** Mind Tools, LTD. (2011). Mission statements and vision statements. Unleashing the power of purpose. *Mind Tools, Essential Skills for an Excellent Career*. Retrieved from [http://www.mindtools.com/pages/article/newLDR\\_90.htm](http://www.mindtools.com/pages/article/newLDR_90.htm)



## Instructions:

This slide and the next are intended to showcase a few of the excellent vision statements that other SET regions have developed. Briefly review these statements with the participants to give them an idea of how these regions have developed their vision statements.

## Script:

“Twenty-nine regions were involved in SET Phases I or II. Let me share with you a couple of vision statements produced as an outcome of the work they completed as part of Module Four.”

[Review the three vision statements highlighted on this slide and the next slide.]

### Examples of Vision Statements

The following are actual statements developed by past SET regions:

#### West Virginia:

The Western Potomac Economic Partnership (West-PEP) will be a magnet for economic growth by attracting new, diverse businesses and investments from around the world. The region's economy will enjoy a global status that ensures superior job opportunities for residents.



Slide: 7

Time: 1 Minute

## *Instructions:*

Continue to highlight the visions statements prepared by states/regions that have been part of SET.

### Examples of Vision Statements

#### **New Mexico:**

Develop a regionally integrated economy while honoring and protecting natural resources, rural lifestyles, "small town" values, traditions, and culture

#### **Colorado:**

The Raton Basin Region is a model of economic prosperity and a healthy rural lifestyle throughout a multi state and diverse cultural area. The Region thrives by cooperatively and collaboratively embracing cultural, economic, educational, technological, and social endeavors.



**Slide: 8**

**Time: 2 Minutes**

## *Instructions:*

We want the participants to begin developing their own vision statement as a regional team. Again, if they already have a vision statement, we want them to refine it based on the core elements a strong vision statement should contain (see Slide 5). This slide simply introduces them to the group activity.



**Group Activity:  
Developing a Vision Statement**



## *Script:*

“Hopefully, the vision statements that we’ve shared with you from past SET regional teams will prove helpful to you. Now, we’re going to ask you to work together on creating a vision statement for your regional team – or refining your vision statement if you have one already developed.”

**Slide: 9**

**Time: 1 Minute**



## Instructions:

The team has the opportunity to begin developing their vision statement. The slide outlines the steps, consistent with the step-by-step process presented in an earlier slide.

**Step 1:** Have each person think through the questions outlined. The key is to have individuals consider their long-term aspirations for the region. In 20-30 years, what does this region look like? What will be the key components of the economy? Are there quality of life factors the group wants to include in its vision? Get them to think long-term.

**Step 2:** Ask the participants to work in small groups (4-5 people) so each person can share his/her ideas with others in the group. Have each small group agree on common themes/ideas. Assign someone from the group to write their final list of themes/ideas on a flip chart and place the list on the wall. [Make sure each paper is labeled by group, and ask them to number the ideas/themes they generate.]

**Step 3:** When each group's poster has been taped to the wall, have the participants study the list of ideas/themes and jot down on Handout One the THREE ideas/themes they feel should be incorporated into a vision statement. Collect the completed forms.

**Step 4:** Ask for 4-5 volunteers to serve as members of the Vision Statement Committee, who will be responsible for studying the recommendations recorded on the SET team members' worksheets and determining areas of commonality and clear-cut differences. The group will prepare a solid first draft of the vision statement and share it at the beginning of the regional team's next meeting or email it to SET regional team members prior to the next meeting to get feedback ahead of time. Remind this committee to use Slide 5 as a guide on what good vision statements should contain.



### Steps in Building a Vision Statement

- 1. Each Person – Reflect on the Following (5 minutes):**  
What does this region look like in 20-30 years? How and where do people live? What do they do for work? What are your hopes/aspirations for the region?
- 2. In Small Groups – Share Your Ideas (10 minutes):**  
Discuss ideas; determine common themes; agree on key ideas/themes most important for your region or for your group's work
- 3. Report Your Small Group's Key Themes with the Whole Group (8 minutes):**  
Identify common themes and opportunities; select most important themes and opportunities
- 4. Develop an initial draft of a vision statement (10 minutes) or assign to a Vision Statement Committee:**  
Use information from Slide 5 as a guide in developing this statement

Source: Adapted from *The Power of Appreciative Inquiry 2nd Edition*. Diana Whitney and Amanda Trosten-Bloom (2010)

**Slide:** 10

**Time:** 30 Minutes

#### **Handouts:**

One-Vision Statement Worksheet  
Two-Vision Statement Selection

#### **Additional Comments:**

If the group already has a vision statement, urge them to still work through this activity. They can determine if the ideas/themes they brainstorm as part of this exercise are consistent with, or are different from, the major ideas/themes incorporated in their current vision statement. Ask them to consider making changes to their vision statement in light of the results of this small group activity.

#### **Source:**

Adapted from Whitney, D. & Trosten-Bloom, A. (2010). *The Power of Appreciative inquiry: A Practical Guide to Positive Change (2nd ed.)*. San Francisco, CA: Berrett-Koehler Publishers, Inc.

## Script:

“It’s time to focus on a vision statement that aligns with the long-term hopes and aspirations you have for the region. Our slide outlines the four steps I’d like for you to work through over the next 35-45 minutes. Give some thought to the questions listed under step one. Jot down your ideas on Handout One: Vision Statement Worksheet.

## Script (Cont.):

[Give them 5-10 minutes.]

Okay, let's get in groups of 4-5 people. I'd like for each of you to share your thoughts and ideas with the members of your small group. See if your group can agree on some common ideas or themes. Please write your small group's ideas/themes on the flip chart you've been given. Please number each of the major ideas/themes you identify.

[After 10 minutes or so, ask each group to report to the rest of the participants. Have them post their information on the wall for all to see as they present their major ideas/themes. When all reports are completed, ask for some overall comments and reactions. Try to limit this to about 10 minutes.]

Now, I would like for each of you to select the THREE ideas/themes from the various group reports that you believe are most important to include in your region's vision statement. Write them on Handout Two: Vision Statement Selection, and turn your completed worksheet in to me.

[Once you collect the handouts:] Do we have 4-5 people willing to serve on the Vision Statement Committee? Your role is to study the input of the SET members (found on the handouts) and develop a good working draft of a vision statement. You should plan to report back to the team at the next SET meeting or email the statement to the team members for them to react to prior to the next meeting.

[If you get people to volunteer, then say:]

Great, thanks for agreeing to do this. We look forward to seeing the results of your committee's assignment."

[If the team does the next Module right after this one, you may want to ask the Vision Statement Committee to meet during the break to continue working on the vision statement. If this is not feasible, ask them to present the revised vision statement at the next scheduled team meeting.]

### Steps in Building a Vision Statement

- 1. Each Person – Reflect on the Following (5 minutes):**  
What does this region look like in 20-30 years? How and where do people live? What do they do for work? What are your hopes/aspirations for the region?
- 2. In Small Groups – Share Your Ideas (10 minutes):**  
Discuss ideas; determine common themes; agree on key ideas/themes most important for your region or for your group's work
- 3. Report Your Small Group's Key Themes with the Whole Group (8 minutes):**  
Identify common themes and opportunities; select most important themes and opportunities
- 4. Develop an initial draft of a vision statement (10 minutes) or assign to a Vision Statement Committee:**  
Use information from Slide 5 as a guide in developing this statement



Source: Adapted from *The Power of Appreciative Inquiry 2<sup>nd</sup> Edition*. Diana Whitney and Amanda Trosten-Bloom (2010)

**Slide:** 10 continued

**Time:** 30 Minutes

#### **Handouts:**

- One*-Vision Statement Worksheet
- Two*-Vision Statement Selection

#### **Additional Comments:**

If the group already has a vision statement, urge them to still work through this activity. They can determine if the ideas/themes they brainstorm as part of this exercise are consistent with, or are different from, the major ideas/themes incorporated in their current vision statement. Ask them to consider making changes to their vision statement in light of the results of this small group activity.

#### **Source:**

Adapted from Whitney, D. & Trosten-Bloom, A. (2010). *The Power of Appreciative inquiry: A Practical Guide to Positive Change (2nd ed.)*. San Francisco, CA: Berrett-Koehler Publishers, Inc.

## *Instructions:*

This transition slide sets the stage for the next section on writing SMART goals.

## *Script:*

“When a pilot takes off from an airport, she has to have a flight plan in place that indicates where she is going and what route she will use to get to her destination. In many respects, you are serving as the pilots for this region. As such, you should have a flight plan – an idea of where you want to take this region. This is where goals come into play.

Let’s take a few minutes to capture your thoughts and ideas on what this regional team should be trying to work on in the weeks and months ahead.”



**Slide:** 11

**Time:** 1 Minute



## *Instructions:*

We want to begin outlining some possible goals the team might wish to pursue. This allows you, as the SET trainer, the opportunity to detect whether some team members may have “hidden agendas” or “preconceived ideas” as to what the team should be pursuing. Hopefully, the group is open to moving in whatever direction needed to move the region forward.

**CAUTION:** It is not our intent to have the team develop and embrace certain goals at this time. Rather, this module is designed to give them the tools they will need when they develop their specific regional goals in Module Eight.

## *Script:*

“Now that you have a working draft of your region’s vision statement, let’s begin thinking about possible directions the team might pursue for its regional goals. It’s too early to settle on what your regional team will be doing since you still have to collect and study important information that could help shape your team’s ultimate regional goals – something you’ll be doing in the upcoming modules. However, it doesn’t hurt to begin generating some ideas regarding these goals.”



**Slide:** 12

**Time:** 1 Minute



## Instructions:

Over the next few minutes, guide the team through a brainstorming activity to help determine the potential directions they are interested in pursuing. Make sure they understand the basic concepts of brainstorming outlined on this slide. It is not the time to debate the merits of each possible direction, but rather an opportunity to generate preliminary ideas.

Ask the participants to take a minute to jot down one or two ideas they would like the region to pursue. After everyone has had a minute to think, go around the room and ask each person to read one of his/her goals. List these on the flip chart as you go. If some individuals say goals that are already listed, simply add a check mark by that goal and move on. Continue around the room until all potential goals are listed.

NOTE: Keep this flip chart and add to it as other ideas surface throughout the coming modules. When you get to Module Eight, you will use this list as a starting point in the development of the team's regional goals.

## Script:

“Now we want to capture your ideas of the potential goals your team might pursue in this region. Please take a minute to think about goals you would like to see your regional group consider. Write down one or two ideas. This is a brainstorming process so there are no ‘bad’ ideas. Also, don’t get bogged down in the details of what you are proposing. A simple statement is fine. We will work out the details later, if necessary. Don’t worry about who will or will not agree with your ideas at the moment. Right now it is important to simply generate a variety of ideas. [Allow the group time to gather their thoughts and ideas regarding goals.]

Let’s go around the room to see what ideas you’ve come up with. I will ask for ONE suggestion from each person. If someone has already offered an idea similar to yours, just let me know, and I’ll make a note that the idea was suggested by more than one person.

[Continue around the room until all potential directions are listed.]

We will hold on to this list and re-introduce it when we get to Module Eight, when your team will develop a list of your priority regional goals.”

## Let’s Brainstorm Some Ideas

### Rules for Brainstorming:

- No ideas are “bad.”
- Don’t get bogged down in detail.
- Consensus is not necessary at this point.

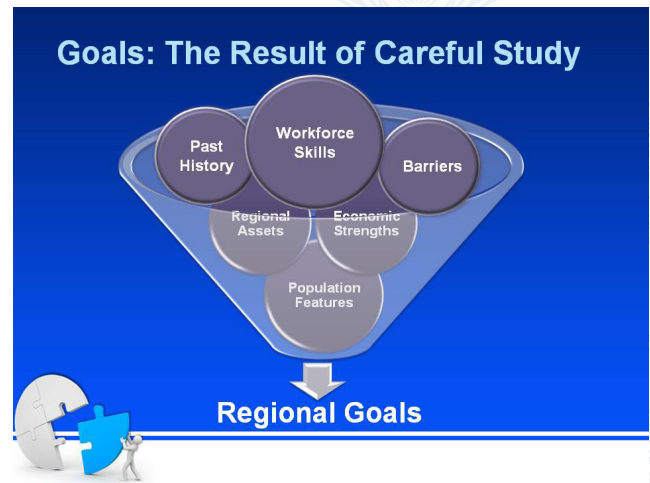


Slide: 13

Time: 5 Minutes

## Instructions:

We want the team to delay developing its regional goals because there's a good bit of homework we want them to do before settling on goals. The diagram showcases some components of that homework. Several of these items will be covered in upcoming modules.



## Script:

“Regional goals do not happen in a vacuum. Instead, they are developed after a careful analysis of a number of factors – factors that can either help or hinder the realization of these goals. The funnel found on this slide highlights several elements that can give shape to your regional goals. It’s important to have a good handle on these items before settling on a set of goals. Let’s take a quick look at these elements:

**Past History:** How well have people, groups and counties located in the region worked together in the past? Do they trust one another? What efforts have been pursued in the past and how successful have they been – why or why not?

**Population Features:** What’s happening to the region’s population? Is the region growing, declining or stable? Who’s leaving the region? Who’s moving in? The information we shared with you in Module Two should prove helpful.

**Workforce Skills:** What is the education and skill levels of your regional labor force?

**Economic Strengths:** What are the major drivers of the economy? Are they likely to grow or decline over time? Do you have economic clusters that can be strengthened and expanded? Are there economic opportunities being missed?

**Regional Assets:** What assets do local people, groups, and communities have that can contribute to the region’s community and economic development plans?

**Barriers:** Are there factors that might impede your regional efforts? What are they and how can you overcome these barriers?

As you can see, there is a good bit of groundwork to complete before your team can develop goals that make sense for the region. A logical first step is to share with you some valuable information about the process for building good goals.”

Slide: 14

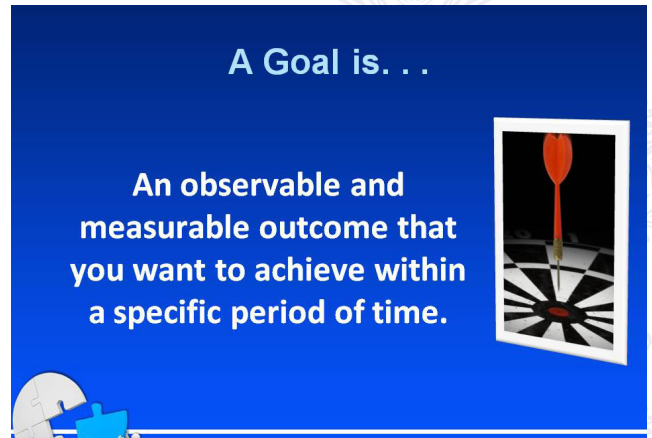
Time: 3 Minutes

## Instructions:

Read the definition of a goal, as shown on the slide.

## Script:

“Let’s begin by defining what we mean by a goal. It is an observable and measurable outcome that we want to achieve within a specified period of time. Goals focus on accomplishments and shouldn’t include the methods that you plan to use to realize these goals. One of the best ways to meet the requirements of a goal is to make sure they are SMART.”

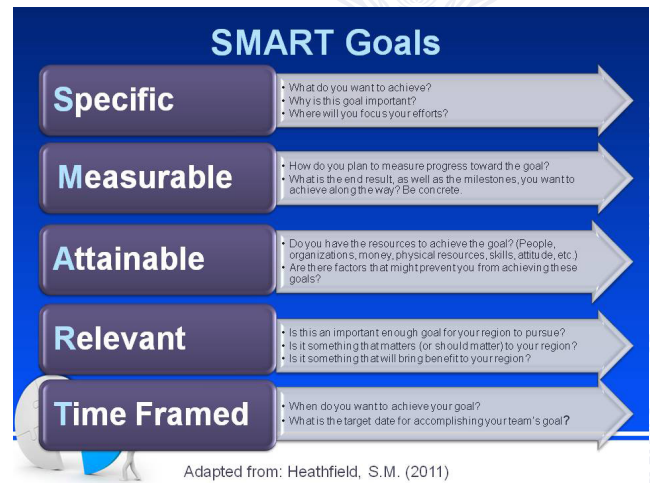


Slide: 15

Time: 1 Minute

## Instructions:

Distribute Handout Three: SMART Goals. Explain to the participants what the SMART acronym means, and then present the key elements associated with each of the SMART components. For example, the first letter refers to the need for each regional goal to be SPECIFIC. Listed to the right of the word SPECIFIC are ideas on how the team can address this first element. Please make sure you highlight each of the five dimensions of the SMART goals, including a brief description of each.



Slide: 16

Time: 6 Minutes

Handout Three: SMART Goals

**Source:** Adapted from Heathfield, S. M. (2011). Beyond smart goals. *About.com Human Resources*. Retrieved from <http://humanresources.about.com/cs/performance/a/goalsetting.htm>

## Script:

“SMART is an acronym that helps define a solid goal. This slide outlines the characteristics of SMART goals and provides a few guiding thoughts for each.

**S means Specific:** Knowing what the region wants to achieve and where they want to focus their efforts is important. Some goals may be region-wide in focus while other goals may be targeted to a smaller geographic area of the region or to a certain segment of the region’s population. As you develop specific goals, think through why these goals are important to your regional planning efforts.

**M means Measurable:** Develop measures that will allow you to document whether you are moving in the right direction in terms of achieving your goals. Think about the ultimate outcomes you want to achieve and the measures you want to use to document your progress along the way.

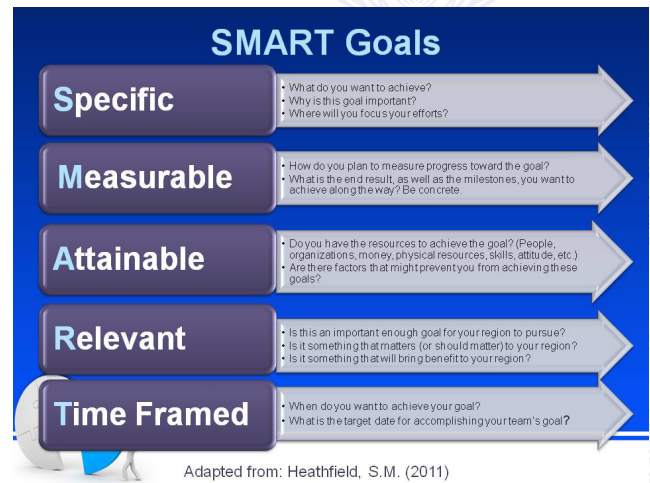
**A means Attainable:** Avoid embracing goals at odds with the current or anticipated resources that will be available in your region. Consider goals that align with the assets of your region. These assets could be people, volunteer groups, local institutions, or physical resources (a topic we’ll cover in a future SET module).

**R means Relevant:** Is the goal something that the region is truly committed to tackling? Since your region may have a variety of goals it wants to pursue related to regional economic development, taking a hard look at the importance and relevance of each specific goal is vital. Consider whether each goal will benefit the region as a whole.



## Script (Cont.):

**T means Time Framed:** Having timelines for each of your goals is important. If you don't have target dates or time frames, then you are likely going to muddle along, having no clear sense of what key actions need to be undertaken and by when. In order to keep things on track, build a timeline of when your team goals are to be accomplished.”



**Slide:** 16 continued

**Time:** 6 Minutes

**Handout Three:** SMART Goals

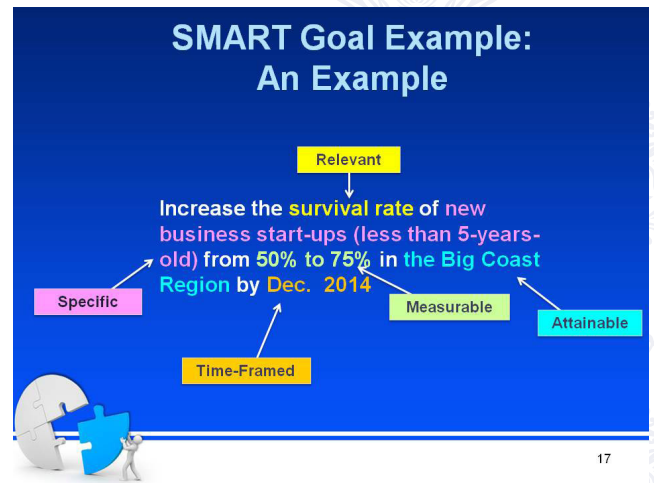
**Source:** Adapted from Heathfield, S. M. (2011). Beyond smart goals. *About.com Human Resources*. Retrieved from <http://humanresources.about.com/cs/performance/a/goalsetting.htm>

## Instructions:

A SMART goal example is presented on this slide. Share with the participants how the five key elements of a SMART goal are found in this statement.

## Script:

“We want to share with you an example of a SMART goal and demonstrate how it can be dissected into its five major parts. Take a look at the five labels that have been assigned to the different parts of the goal statement. This is a good example of how a goal can be concise but still contain all the SMART elements.”



Slide: 17

Time: 2 Minutes

## Instructions:

Let the group know that developing goal statements is demanding and thus, cannot be completed in short-order. Taking time to develop strong and clear goals can pay dividends down the road. Share with the group the importance of creating SMART goals.

## Script:

“Some of you may have had past experiences developing goals – personal goals, ones related to your own business or ones you’ve prepared for your employer. Developing solid goals is indeed tough work. The more people you involve in creating goals, the more demanding the process becomes (although getting others involved is certainly important if we want their buy-in). Your team has a real challenge ahead – preparing strong, concise goals that offer you and others a clear roadmap of where your team is heading over the next few years (just like the pilot who needs a flight plan in order to know how to get to his or her destination). In the remainder of this session, I going to give you a chance to begin developing SMART goals for the region.”

**Developing a SMART Goal**

Vague Goals = Vague Results

Prepare a goal that's crystal clear, concise:  
**SMART!**

Slide: 18

Time: 2 Minutes

## *Instructions:*

Use this slide to introduce a group activity. The details of this activity are specified in the next slide.

## *Script:*

“You will develop a final version of your region’s major goals in Module Eight, but there is one type of goal worthwhile for you to begin working on – your team’s goal as an organization.”



**Slide:** 19

**Time:** 1 Minute



## *Instructions:*

Share with the participants two of the organizational goals developed by past SET teams.

## *Script:*

“Let me take a moment to give you a sampling of some of the organizational goals that past SET regions have developed. These examples might help you get a better idea of what type of structure your SET team wants to establish in the region.”

### Examples of Organizational Goals by SET Regions

#### West Central Ohio Network:

- Develop a marketing plan for the West Central Ohio Network by March 2013 to enable the WCON-area to be recognized as a regional leader in economic development.

#### North Central New Mexico Development Partnership

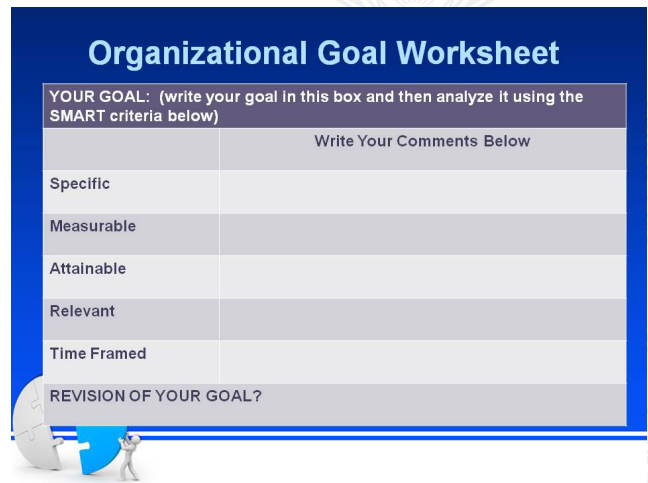
- By December 31, 2011, develop a non-profit corporate structure for the organization and complete tax-exempt application with the IRS as an economic development corporation.

**Slide:** 20

**Time:** 2 Minutes

## Instructions:

It is important to prevent the regional team from getting too carried away with the development of regional goals until several of the upcoming modules have been completed. However, in order to provide the team with a valuable activity at this point, have them identify a goal that relates specifically to the manner in which they want to organize themselves as a team. Do they want to remain organized as an informal group, become a formal organization or pursue some other type of organizational identity? If they are already a formal organization, do they want to adjust its membership or the counties/communities that are officially part of the organization? Hopefully, this segment of Module Four will allow them to think through these issues in a systematic manner.



### Organizational Goal Worksheet

YOUR GOAL: (write your goal in this box and then analyze it using the SMART criteria below)

	Write Your Comments Below
Specific	
Measurable	
Attainable	
Relevant	
Time Framed	
REVISION OF YOUR GOAL?	

**Slide:** 21

**Time:** 10-15 Minutes

**Handout Four:** Our Team's Organizational Goal

## Script:

“Let’s take a minute to focus on a pretty important matter for your team. As I’ve mentioned earlier, you will be exposed to a good bit of new information in our upcoming modules. I’m pretty confident the additional information you will collect and analyze, such as economic data and regional assets, will likely result in rethinking some of your initial ideas regarding regional goals. While it may be premature for you to build goals relating to your region, it’s not too early to discuss the goal you have with regard to the continuity and sustainability of your team – that is, the type of organization you would like to become in the future. Do you want to establish a formal organization that helps advance the work reflected in SET, or are you content to operate in an informal manner? Is there some other type of structure that you would like to consider for your group? If you’re a formal group already, are there any adjustments you want to make in terms of membership in your organization, such as inviting a wider array of counties and communities to become part of your group?”

To help get this discussion off the ground, I’d like to ask you to complete the following statement:

***To strengthen the organization and continuity of our regional team, we will within the next 12 months . . . [state what you would like to see happen].***

## Script (Cont.):

Working in pairs [or small groups of 3-4], use the elements of a SMART goal to build the goal for your team's organization. You can use Handout Four: Team's Organizational Goals to help you create a goal statement that includes the key attributes of a SMART goal.

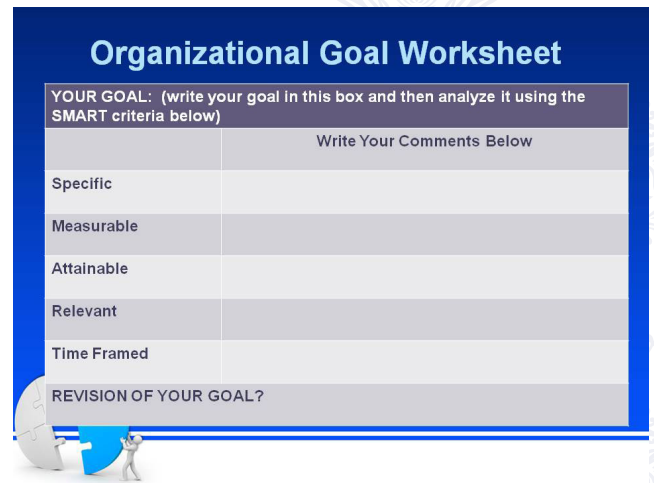
[Allow time for the groups to work.]

Let's hear what you had to say about the proposed organizational goal of your team. Let's start off with the first pair/group.

[Let each pair/group respond. Have the others provide feedback on their SMART goals.]

Given what you've heard from our various groups, what is the goal of your team in terms of its long-term organizational structure? Let's try to come up with a working draft of your organizational goal.

Let's make sure we reintroduce this organizational goal in the discussions that will take place in Module Eight. We'll have time at that point to refine the team's organizational goal."



**Organizational Goal Worksheet**

YOUR GOAL: (write your goal in this box and then analyze it using the SMART criteria below)

	Write Your Comments Below
Specific	
Measurable	
Attainable	
Relevant	
Time Framed	
REVISION OF YOUR GOAL?	

**Slide:** 21 continued

**Time:** 10-15 Minutes

**Handout Four:** Our Team's Organizational Goal

## Instructions:

Take a few minutes at the end of Module Four to ask individuals what they felt were the major takeaways. What did they find most valuable and what remains a bit unclear to them? Take time to clarify these items, as appropriate.

## Script:

“Let’s take this time to reflect for a few minutes on Module Four. Tell me what you found most useful or valuable? What, if anything, remains a bit fuzzy to you? What needs to be clarified? Any other thoughts or observations about this module?”

## Final Reflections

- What did you find most helpful and valuable in this module?
- Are there any items that need to be clarified?



Slide: 22

Time: 5 Minutes



## Instructions:

Review with the team some specific activities that might need to be completed prior to their next meeting.

## Script:

“You did excellent work in this session, but there are some items you need to continue working on before our next meeting. Some possibilities are listed on this slide. Is there a sub-committee of 3-4 people that would be willing to refine the organizational goal and have it ready to share with the group at our next SET team meeting? [NOTE: Appoint a sub-committee if it looks like more work on the organizational goal is needed]. Let’s agree on other items on this list (or ones that aren’t on the list) that we want to make some good progress in completing before our next meeting.”

### Homework Ideas

- Finalize the Vision Statement
- Ask 2-3 locals for reactions to the vision statement (if it's completed)
- See if your goal as an organization needs to be fine-tuned by a sub-committee
- Other items?



Slide: 23

Time: 2 Minutes

## Instructions:

Briefly review what will be covered in Module Five.

## Script:

“In Module Five, we will examine a variety of data that help paint a more comprehensive picture of the economic features of the region, such as the educational level of adults of working age, characteristics of the workforce, industry and occupational make up of the labor force, and job projections for the region (what’s growing, declining, and remaining stable).”

### What’s Ahead

#### Module Five:

- We’ll examine a variety of regional economic-related data, such as:
  - Education
  - Workforce
  - Industry
  - Occupational projections



Slide: 24

Time: 2 Minutes

## Acknowledgements

The Stronger Economies Together (SET) Program is sponsored by USDA Rural Development (USDA RD), in partnership with the Regional Rural Development Centers. In particular, USDA RD provided financial support for this important initiative while the RRDCs organized the team of land-grant university-based Extension and research faculty who worked on the development of the SET training modules and the generation of the data products.

Key partners involved in the development of SET educational materials include:

- Extension and research faculty from a variety of land-grant universities in the U.S.
- The National Institute of Food and Agriculture, USDA, that works hand-in-hand with the RRDCs and the land-grant university system across the U.S.
- The Economic Development Administration, U.S. Department of Commerce for granting us permission to use selected portions of its *Know Your Region* training products.



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