

Creating Better Goals:

Calibrating Measures of Success with CORE Planning

Toolkit

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Activity 1: Chartering

Vision - Who do we want to be?

Mission - How are we planning to get there?

Objectives - How will we measure success?

- 1.
- 2.
- 3.
- 4.

Metadata – Assumptions, Rationale, Things to Watch, Risks?

- 1.
- 2.
- 3.
- 4.

Additional Notes:

Activity 2: Turning Objectives into SMARTER Goals

Goal/Objective 1: _____

Is it Specific?	Y	N	Assumptions:
Is it Measurable?	Y	N	*
Is it Attainable?	Y	N	*
Is it Relevant?	Y	N	*
Is it Time Sensitive?	Y	N	Notes:
Is it Ethical?	Y	N	
Have you Re-evaluated lately?	Y	N	

Goal/Objective 2: _____

Is it Specific?	Y	N	Assumptions:
Is it Measurable?	Y	N	*
Is it Attainable?	Y	N	*
Is it Relevant?	Y	N	*
Is it Time Sensitive?	Y	N	Notes:
Is it Ethical?	Y	N	
Have you Re-evaluated lately?	Y	N	

Goal/Objective 3: _____

Is it Specific?	Y	N	Assumptions:
Is it Measurable?	Y	N	*
Is it Attainable?	Y	N	*
Is it Relevant?	Y	N	*
Is it Time Sensitive?	Y	N	Notes:
Is it Ethical?	Y	N	
Have you Re-evaluated lately?	Y	N	

Activity 3: Adding CORE to your planning

Common Understanding – How are you going to ensure the big picture is communicated so that each team member understands why the team is going, how they are planning to get there, and how you will measure success?

Objectives Chunked - Objectives and Goals are a team effort. *How will you chunk the macro objectives into individual units of work and accountability?*

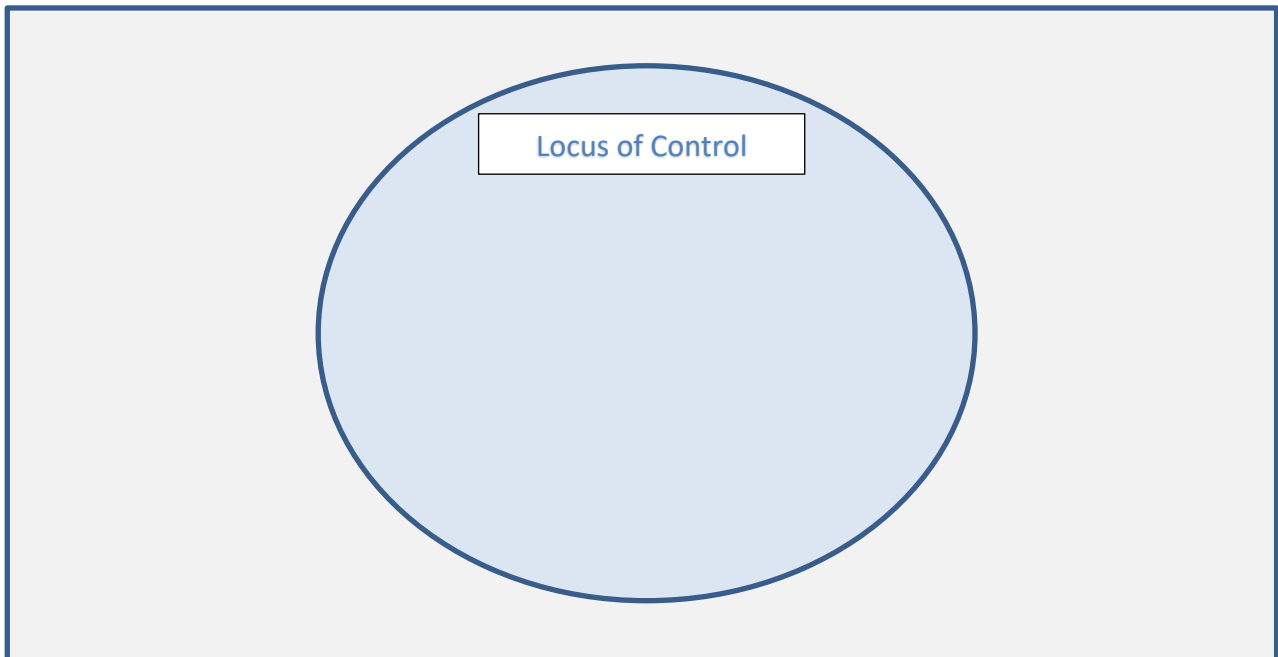
Reasonable Plan – Assess if the team understands the plan, their individual contributions and believes both their parts and the plan as a whole will be successful. *How will you monitor the team seeing the potential for success?*

Explain “The Why” – In “Common Understanding,” leaders make sure everyone has a common understanding of direction and the big picture. Explaining why something is important or the series of decision that went into a decision is important. This can be embedded in the overall message, documented for those that would like to “see the math,” or held as a separate meeting all to itself. *How will you supply the metadata that some need to be successful?*

Activity 4: Planning Around COVID – Focusing on your Locus of Control

Concern	Can we control it?	If not, what can we control

Areas of Concern



Activity 5: Exit Slip

What is something NEW I learned today:

What is something that I ALREADY KNEW but was reinforced today:

What was the MOST IMPORTANT THING that I heard today:

What is something that I learned that I could start using tomorrow:

Activity 6: Homework

Action Items for putting this information to use.

(Action Item = unit of work + owner + deadline)

	Item	Owner	Deadline
1			
2			
3			
4			
5			
6			