SMARTIE Goals: A Powerful Tool for Informing CCO Deliverables

Presented by Insight for Action
December 2, 2022

Presenters

Ronda Zakocs (she/her)
Founder & Principal
Insight for Action

Nidhi Pai (she/her)
Project Manager
Insight for Action

Diving Deep for Social Change

https://insightforaction.net/

Objectives

We hope you will walk away with a better understanding about...

- ✓ What is a SMARTIE goal
- ✓ Why it's useful for designing OHA required documents for TSQ, CHP, and SHARE Initiative documents
- ✓ How a CCO designed and uses SMARTIE goals
- ✓ Principles to guide collaborative process for designing a SMARTIE goal

Meeting Flow

- ✓ Reflect on your past experiences with goal setting
- ✓ Share elements of a SMARTIE goal
- ✓ Hear from Heather Oberst about Columbia Pacific CCO's experience with designing and using SMARTIE goals for its community health improvement plan
- ✓ Offer six principles to guide the design of SMARTIE goals
- ✓ Breakout room discussions on applying SMARTIE goals to your CCO deliverables

A Poll

Let's take a poll about our experiences with designing goals.

Community Health Improvement Plan (CHP)

CCOs are required to draft five-year, comprehensive community health improvement plans to address needs and priorities as identified in community health assessments.

SHARE Initiative

Supporting Health for All through Reinvestment (SHARE) requires that CCOs invest a portion of profits back into communities to address health inequities and the social determinants of health and equity.

Transformation and Quality Strategy (TQS)

CCOs are required annually to draft transformation and quality strategies aimed at meeting the triple aim of better health, better care, and lower costs.

Goal Statements Required

What is a SMARTIE Goal and Why Use Them?

SMART to SMARTIE Goals

Specific	**Measurable**	**Action-Oriented**	**Relevant**	**Time-Bound**	**Inclusive**	**Equitable**
S	**M**	**A**	**R**	**T**	**I**	**E**
What is it you want to achieve? Consider including the 5Ws: what, why, who, where, and when.	How will you know when you have achieved your goal? To be able to track progress and to measure the result of your goal, consider: how much or how many?	To keep you motivated toward attaining your goal, are there identifiable intermediate actions or milestones?	What results can realistically be achieved given your available resources, including people, knowledge, money, and time?	What is an appropriate deadline for achieving your goal? How will you track progress?	How will you include disproportion-ately affected people into processes, activities, and decision making in a way that shares power?	How will you include an element of fairness or justice that seeks to address systemic injustice, inequity, or oppression?

SMART to SMARTIE Goal: An Example

SMART Goal

Expand youth mentorship program into three new counties by the end of June

SMARTIE Goal

Expand youth mentorship program into three new counties by the end of June, with volunteer task forces that are **representative of the community** (by age, gender, race and other characteristics) **advising the expansion**

Source: The Alford Group

Variations in SMARTIE Goals

Engineer Inclusion

Specific	Measurable	Action-Oriented	Relevant	Time-Bound	Inclusive	Equitable
S	**M**	**A**	**R**	**T**	**I**	**E**

The Management Center

Strategic	Measurable	Ambitious	Realistic	Time-Bound	Inclusive	Equitable
S	**M**	**A**	**R**	**T**	**I**	**E**

The Alford Group

Specific	Measurable	Achievable	Relevant	Time-Bound	Inclusion	Equity
S	**M**	**A**	**R**	**T**	**I**	**E**

Why SMARTIE Goals Matter

" Goals are a concrete way to drive results, but without an explicit **equity and inclusion** component, goals won't produce better outcomes for (...) communities, address disparities, or create **belonging**. "

The Management Center

" Let's be clear, SMARTIE is not about tokenism; the difference is power. SMARTIE goals embrace the **idea of power with others and power within when (...) people** and communities, particularly those impacted by a goal, are included in a way that shares power, shrinks disparity and leads to more equitable outcomes. "
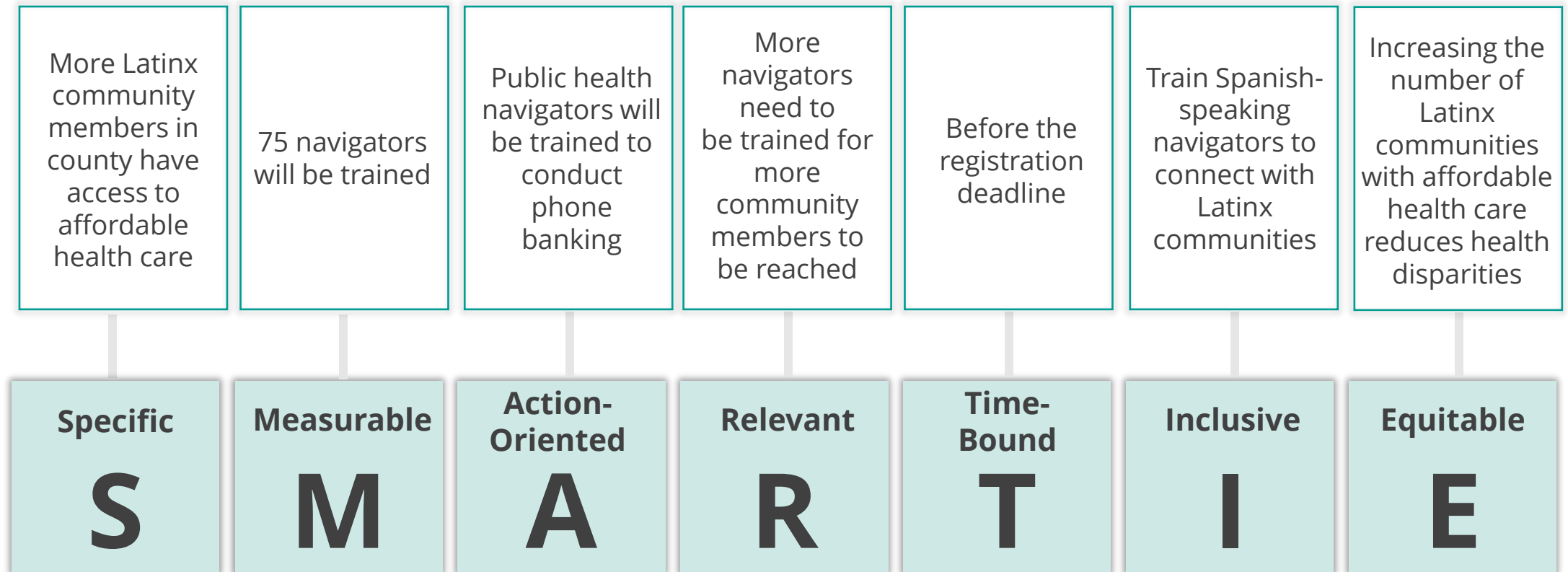
Michelle Bibbs, Alford Group

" When you create goals with the ideas of inclusion and equity as critical components, you **engage people** who are often **excluded from decision making and power sharing** to drive meaningful participation while addressing systemic injustice and oppression. "
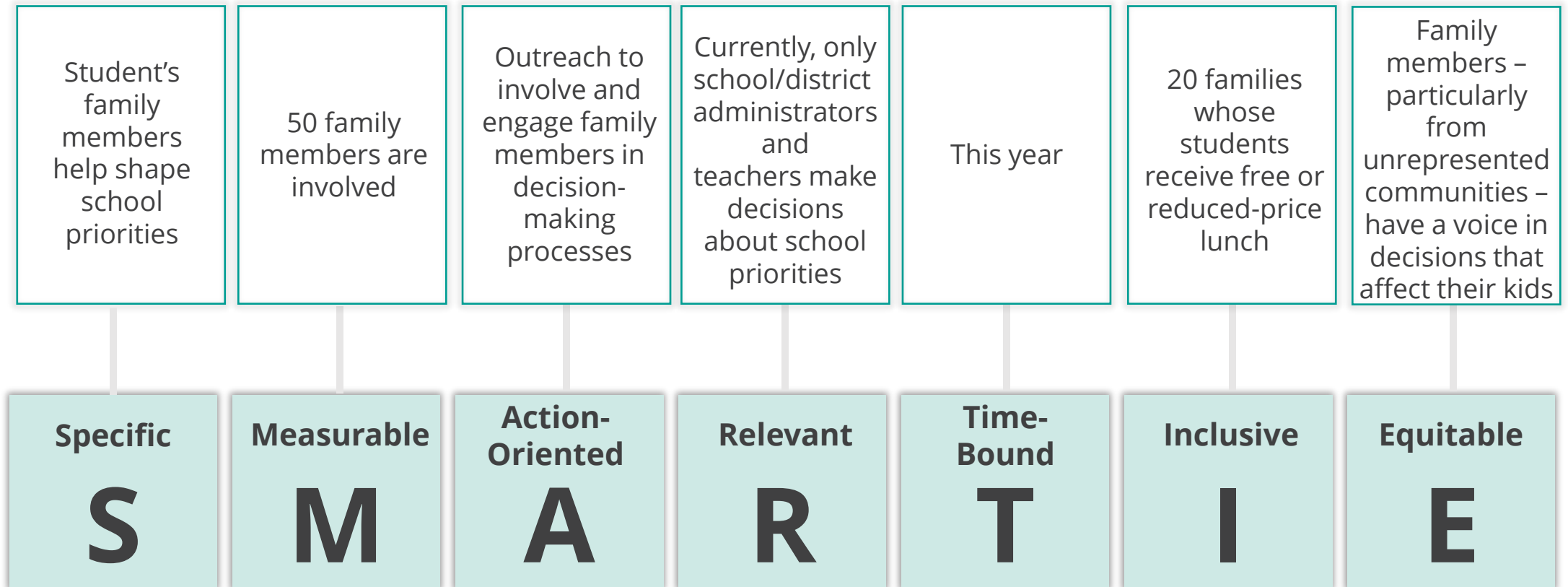
Women's Food Service Forum

SMARTIE Goal Example 1

Train 75 Spanish-speaking public health navigators to conduct phone banking in *Scott* County to connect Latinx communities to affordable health care before the registration deadline.
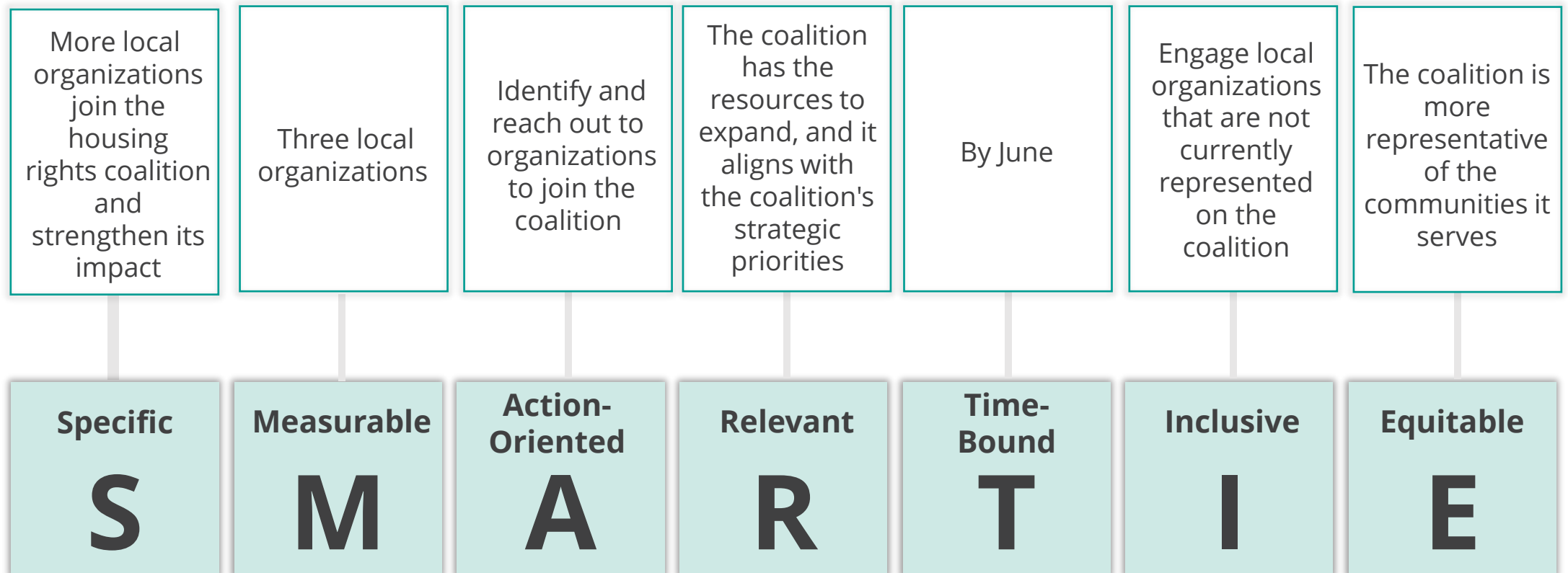
More Latinx community members in county have access to affordable health care	75 navigators will be trained	Public health navigators will be trained to conduct phone banking	More navigators need to be trained for more community members to be reached	Before the registration deadline	Train Spanish-speaking navigators to connect with Latinx communities	Increasing the number of Latinx communities with affordable health care reduces health disparities
Specific	**Measurable**	**Action-Oriented**	**Relevant**	**Time-Bound**	**Inclusive**	**Equitable**
S	**M**	**A**	**R**	**T**	**I**	**E**

SMARTIE Goal Example 2

Involve 50 family members in making key decisions about school priorities this year, with at least *20* families whose students *receive free or reduced-price lunch*.

Specific	Measurable	Action-Oriented	Relevant	Time-Bound	Inclusive	Equitable
Student's family members help shape school priorities	50 family members are involved	Outreach to involve and engage family members in decision-making processes	Currently, only school/district administrators and teachers make decisions about school priorities	This year	20 families whose students receive free or reduced-price lunch	Family members – particularly from unrepresented communities – have a voice in decisions that affect their kids
S	**M**	**A**	**R**	**T**	**I**	**E**

SMARTIE Goal Example 3

Recruit 3 local organizations to join the housing rights coalition by June. These organizations should work with communities that are not currently represented in the coalition.

Specific	Measurable	Action-Oriented	Relevant	Time-Bound	Inclusive	Equitable
More local organizations join the housing rights coalition and strengthen its impact	Three local organizations	Identify and reach out to organizations to join the coalition	The coalition has the resources to expand, and it aligns with the coalition's strategic priorities	By June	Engage local organizations that are not currently represented on the coalition	The coalition is more representative of the communities it serves
S	**M**	**A**	**R**	**T**	**I**	**E**

Heather Oberst (she/her)
Community Engagement Manager
Columbia Pacific CCO

CPCCO's SMARTIE Goal Context

CPCCO is committed to community-centered approaches to our work

Our Community Engagement Team holds multiple OHA deliverables*

Increased need to communicate how JEDI principles are "baked in" to all work

Needed tools for contracting JEDI expectations w/ CBOs in grant LOAs

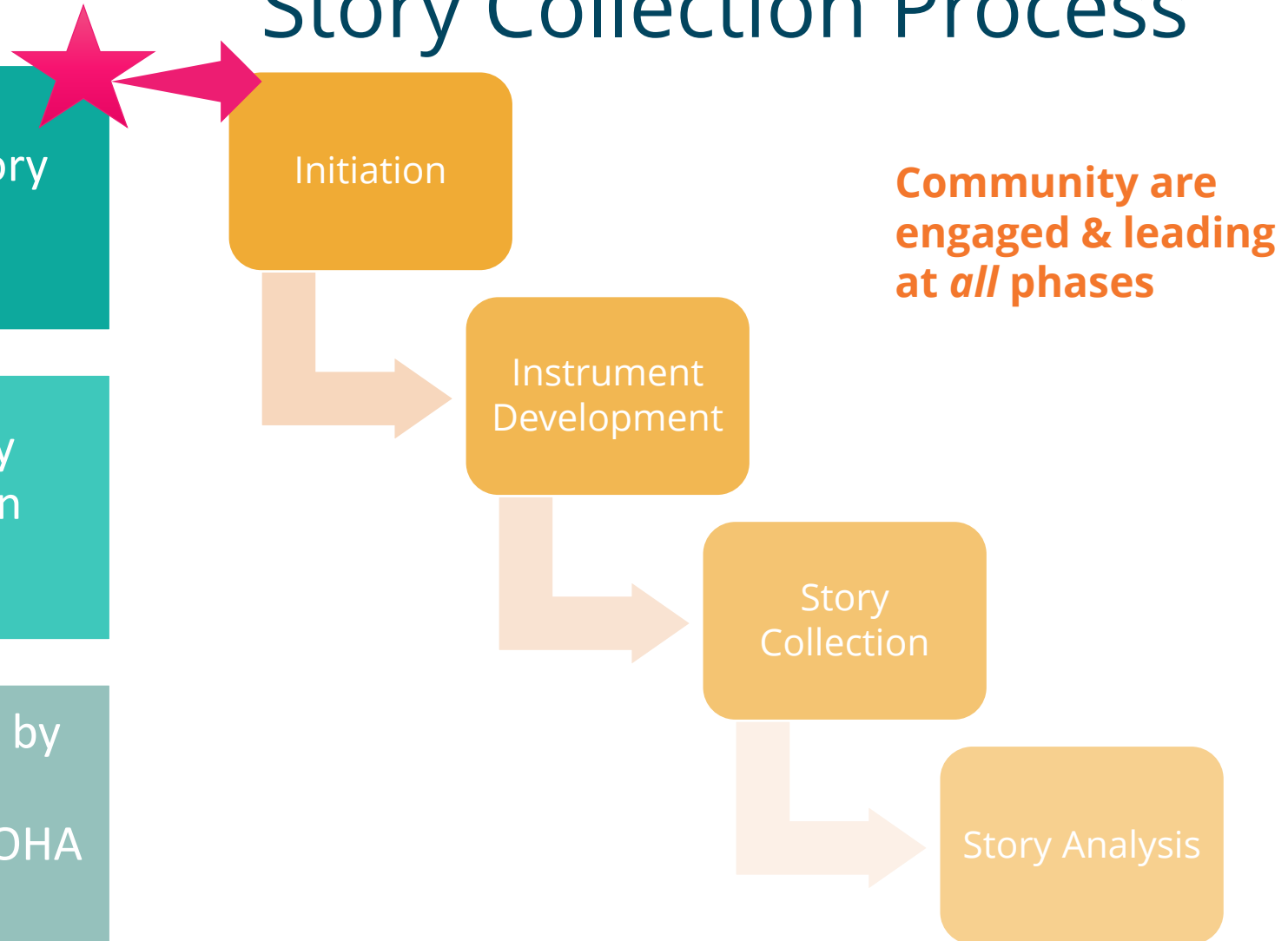Much of the Community Engagement Team was familiar with/using SMART goals

Have access to community wisdom through CACs and our story database*

CPCCO's Regional Health Assessment

Components

| Public health and hospital CHNAs (2021-2022) | Narrative story collection |

| Reviewing and tailoring population health indicators | Community prioritization process |

| SMARTIE Goals Drafted into RHIP | RHIP adopted by RCAC and submitted for OHA approval |

Story Collection Process

Initiation

Instrument Development

Story Collection

Story Analysis

Community are engaged & leading at *all* phases

CPCCO's SHARE Partnership: Healthy Homes

Informed by the results of our *last* Regional Health Assessment

Aligns with other deliverable priorities: RHIP, CAC Demographics

Required that we communicate about "baking equity in" with our partner

Opportune tool for testing SMARTIE goals as part of an LOA

SMART goals language offered a shared foundation

Could lean on community wisdom without "going back to the well"

Healthy Homes—SHARE

Goal #	S	M	A	R	T	I	E	Final
3	Create formal agreements with cross-sector partners. Could include partners who will refer into the program, Habitat, or contractors.	Three LOAs per county, in all three counties, for a total of nine.	LOAs signed; minimum partnership needed to close loops in each county.	Can be achieved in each county; is a necessary milestone in ability to complete projects in each county.	End of month 9 of funding.	Should ideally include at least one organization that partners with CPCCO and CAT in the RHIP priorities. Can use stories or COVID emergency funds to identify.	At least one of the organizations should explicitly serve: Latinx/o/a community, survivors of intimate partner violence, those with intellectual or physical functional difficulties, and/or OHP members.	By the end of month 9, sign at least 9 LOAs (3/county), including organizations that partner in meeting RHIP priorities and those who serve Latinx/o/a community, survivors of intimate partner violence, those with intellectual or physical functional difficulties, and/or OHP members
4	Adoption and use of Connect Oregon to refer members into Healthy Homes.	Receive a minimum of 5 referrals per county on Connect Oregon, closing the loop (responding to sender) on 3 of 5 referrals. Would total 15 received referral, with 9 receiving a response.	Milestones could include receiving the first referral in each county, closing the loop on the first referral in each county, other measures that CO was used effectively. Could also include a marketing effort …	Is free and includes technical assistance both from Unite Us and from CPCCO as needed.	End of month six of funding.	Referrals should come from partner organizations who serve OHP members.	All referrals should be for OHP members, should focus on referrals for focus populations listed above.	By the end of month 6, receive at least 15 referrals through Connect Oregon, responding to at least 9, and with at least 3 coming on behalf of members who identify as part of the focus populations.

Community Advisory Councils—Internal Workplan

Primary	Details	End Date	Status	Assignee	Inclusion ⓘ	Equitable ⓘ
⊞ Project Information						
⊟ Community Advisory Councils Project Plan						
⊟ **By June 30, 2022, build CACs that are more reflective of the community, as measured by completing the demographic report and comparing to last years'.**		**06/30/22**			We've identified focus populations as a CCO (based on RHA) who should be represented on the CAC without quota, including People of Color, survivors of IPV, people with complex health needs or are functionally diverse, English Language Learners, etc.	Addressing barriers to participation or needed services/connecting people to resources, and encouraging current members to recruit and advocate all lead to a CAC that reflects the community, which shares power and promotes a healthier community.
Refine language access workflow		04/29/22	**Complete**	MR Martha Ruiz-Olmstead RC Romy Carver		
Document recruitment outreach	Document recruitment in workflow doc; document events in shared calendar; work with BMC on a recruitment/outreach plan	06/30/22	**Complete**	KB Kim Bosse' MR Martha Ruiz-Olmstead RC Romy Carver		
Complete CAC Demographic Report	Includes comparison to 2021 to document changes in diversity among CACs	06/30/22	**Complete**	Heather Oberst NK Nancy Knopf TL Teresa Lavagnino		

Benefits of SMARTIE Goals

✓ Requires inclusion and equity to be part of your planning from the start

✓ Gives a *concrete* idea of what success looks like

✓ Encourages us to ask: "How do we know this is the right goal? Have we asked those most impacted?"

✓ Easy to track and report progress

✓ Keeps us motivated because the goal is clear and aligned with our organizing principles

✓ The process of drafting allows for a *lot* of conversations about the nature of the work

Challenges for Implementing SMARTIE Goals

Challenges

- ✓ All goals are only as good as our willingness to track them
- ✓ It can be challenging to set timelines for ongoing or long-term work
- ✓ People & partners may not immediately see the need for "IE" addition
- ✓ We can't see the future

Ideas

- ✓ Huddles or check-ins can be structured around goal
- ✓ Set goal timing to "stakes in the ground" or natural milestones
- ✓ Open, curious communication is key to the process
- ✓ Set "gut checks" at midpoints to adapt goals

Principles to Guide Design of SMARTIE Goals

Principles to Consider When Crafting SMARTIE Goals
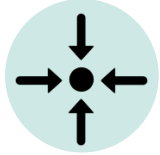
Convene a diverse group of people to co-design goals.

Clarify decision-making process for final approval.

Don't start with a blank slate; begin with what you have.
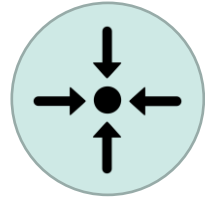
Consider designing goals at multiple levels.

Use a planning worksheet or template to guide the design process.

Apply litmus test questions to assess quality.

Principles to Consider When Crafting SMARTIE Goals

Convene a diverse group of people to co-design goals.

Consider:

✓ Who has experience and expertise around the topic to design goals?

✓ What diverse lived and professional experiences are needed to ensure a balanced perspective around the topic?

Clarify decision-making process for final approval.

Consider:

✓ What decision-making process will be used: consensus, majority vote, one group, or one person?

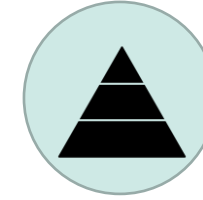✓ Who has authority to make or participate in final approval of goals?

Principles to Consider When Crafting SMARTIE Goals

Don't start with a blank slate; begin with what you have.

Consider
- ✓ What assessment documents exist?

- ✓ What past or current strategic plans exist that may inform design of goals?

Design goals at multiple levels: strategic, operational, tactical level.

Consider:
- ✓ What mix of goals may be useful?[1]
  - Strategic: Overarching
  - Operational: Human capital, resources
  - Tactical: Activities

[1] The Alford Group

Principles to Consider When Crafting SMARTIE Goals

Use a planning worksheet or template to guide the design process.

Consider:

✓ What worksheets or templates may be most relevant to your situation?

✓ What is the process for the group to use these worksheets or templates?

Resources include:
The Management Center
Engineer Inclusion
Educator Evaluation

Apply litmus test questions to assess quality.

Consider these questions:[1]
1) Does this goal mitigate potential inequities in the outcomes and/or process?
2) Will achieving this goal represent significant progress towards our mission?
3) Did we get input from people who will be impacted by the process or the outcomes?
4) Are the measures of success for this goal clear to everyone?
5) Is there a deadline for this goal?
6) Do we have the capacity, systems, and processes needed to achieve this goal?

[1] The Management Center

Reflect & Dialogue

Let's reflect on ways to apply SMARTIE goals to current or future CCO-related deliverables.

Instructions for Breakout Groups

- Use Google Slides to reflect upon SMARTIE definition, example, and 6 principles, and discussion prompts.

- In breakout groups, take turns sharing:
  - Name, organization and a CCO-related deliverable (or other document with a goal statement) that you or your team is or will be working on.
  - Share what **excites** and **daunts** you about designing SMARTIE goals.
  - Identify one principle that may be useful for designing SMARTIE goal.

Resources

SMARTIE Goal Definitions
- The Management Center
- The Alford Group
- Engineer Inclusion

SMARTIE Goal Examples
- The Management Center (Goals Bank)

SMART & SMARTIE Goal Worksheets
- The Management Center
- Engineer Inclusion
- Educator Evaluation Implementation Resources
- South Dakota Good & Healthy Community Assessment and Improvement Planning Toolkit*: Handout and Template
- Minnesota Department of Health*

* SMART goal resources recommended in OHA resources (See: CHA/CHP resources page and TQS guidance)