

Mission & Summary Statement for Department

SMART Goals & Strategies to Achieve Those Goals (Known as ‘Tactics’ in the Business Plan’

Note: See last page for explanation and tips.

Meetings/Projects/Events Calendar

Note: To insert (or delete) a row, click on a cell in the table, then select Table > Insert row... (or Delete row...).

Approx. Dates	Meeting/Project
Q1 (Jan '19 - Mar '19)	
Q2 (Apr '19 - June '19)	
Q3 (Jul '19 - Sep '19)	

Q4 (Oct '19 - Dec '19)	

Personnel Requirements

Note: Salaries and Benefits should be reported in Budget only, not here.

- Current Personnel:
- New Employees (listed in order of priority):
 -
- Volunteer Requirements:
 -
- Training

Budget Overview

Note: Feel free to add or delete sections or accounts as applicable to your department.

Revenue:

Expenses:

Other Income:

Other Expenses:

Capital Expenditures, Improvements you want to make at year's end (CapEx):

SMART Goals

S - SPECIFIC

Start with a rough idea or topic, then flesh it out by asking yourself the 5 W's:

1. **Who?** Specific people or program(s) that would be involved.
2. **What?** Specific task to complete or number/metric to reach.
 - a. Related to M - MEASURABLE.
 - b. Ex: Transport XX pets out of Los Angeles to other areas of the country. Develop partnerships with XX additional groups with a minimum send of XX cats/kittens.
3. **When?** Specific due date or time period.
 - a. Related to T - TIME BOUND.
 - b. Ex: Starting in Sept and every 6 weeks thereafter
4. **Where?** Specific place or space that would be involved.
 - a. This could be a physical location, such as a store, or a virtual one, such as a website.
 - b. Ex: From LA to other parts of the Country
5. **Why?** Specific reason for wanting to accomplish goal.
 - a. Related to R - RELEVANT.
 - b. Does this goal help achieve the mission of your program and BFLA?
 - c. Why is this particular goal worthwhile? Will it target low-hanging fruit, ie provide more bang for the buck than other goals you're considering? Think about the 80/20 rule.
 - d. Ex: To avoid a bottle neck of adoptable cats/kittens.

M - MEASURABLE

Do you have an accurate way to track progress toward your goal, or at least recognize when the goal has been reached?

Ex: Track transport by age and species and track time needed to perform health certs

A - ATTAINABLE

Is the goal realistic considering the constraints (time period, staff, space, resources required etc.)?

On the flip side, is it also a bit of a stretch? There isn't much point in setting easily-achieved goals.

R - RELEVANT

How does this goal further the mission? Is it obvious how it helps, or is the connection weak (which means the goal could unfortunately contribute to "mission drift")? See "Why?" under S - SPECIFIC.

T - TIME BOUND

See "When?" under S - SPECIFIC.

NOTES

- Start off by thinking about the big picture for your department (mission). Then brainstorm a bunch of ideas. Narrow them down to a handful that will contribute the most to the mission via the least amount of effort/cost. Then refine each one using the SMART Goal guidelines.
- Once you have solidified your goals, ask yourself "**How?**" That is, what tactics will you use? What are the major milestones you need to hit along the way? Are there sub-goals? In essence, come up with a detailed game plan or list of strategies.