**WELCOME**

<table>
<thead>
<tr>
<th>FACILITATOR TALKING POINTS</th>
<th>TIME: 5</th>
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</thead>
<tbody>
<tr>
<td>• Welcome the group at the door and have music playing, if possible.</td>
<td></td>
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<tr>
<td>• Start with a warm-up activity to get the group connected.</td>
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<td>• Set up any ground rules (i.e. no cell phones) and expectations (i.e. everyone joins in the discussion).</td>
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<tr>
<td>• Review the schedule or timeline with the group.</td>
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<tr>
<td>• Review the goals of this activity with the group found in the guide.</td>
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<table>
<thead>
<tr>
<th>TRANSITION</th>
<th>TIME: 1</th>
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<tbody>
<tr>
<td>• EXAMPLE: Now that we are familiar with one another and understand the roadmap, let’s get started.</td>
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### Setting Goals as an Organization

#### FACILITATOR TALKING POINTS
- Let’s start by talking about why goal setting is important
- I am going to ask a few questions and if you feel comfortable, please raise your hand if you have experienced any of the following:
  - How many of you have had experience setting goals for an organization?
  - Taken time to reflect on the accomplishments and failures of the organization?
  - Had a conversation on what goals would be important for the organization to achieve?
  - How those goals relate to your individual goals as members of the organization?
  - How many of you achieved those goals?
  - Used a template to develop the goals?
  - Developed a timeline to complete the goals?

#### TIME: 5 min

#### TRANSITION
We are here today to build upon the skills we may already use to develop organizational goals as a team and learning from one another.

#### ACTIVITY INSTRUCTIONS
- In order to set goals for the upcoming year, it is important to reflect on your organization as a whole.
  - Using the SWOB Analysis, your organization will be halfway there to setting goals for the upcoming year!
  - Using this tool for reflection can also help your organization be on the same page
- Take a minute to reflect back on the year and think about the meetings you held, programs you developed and facilitated, community service you participated in, collaborations with other groups or departments, barriers you might have faced and write down some of the things that come to mind
- Now using the SWOB chart, take 5 minutes to individually fill it out
- Once you are done, take 5 minutes and turn to a partner and discuss what you have
- As a group, use a word document, large sticky note pads, or whatever materials you may have available

#### TIME: 15 min

#### SWOB Analysis
to you to create a group SWOB chart with ideas for all members of the group

**DEBRIEF**
Once you have collectively filled out the SWOB chart as a group, discuss the following questions:
- What are your initial thoughts seeing the group SWOB chart?
- What are some commonalities that we see? Is there context that would be helpful to explain about any of the points on the SWOB chart?
- Is there anything that surprised you?

After discussing the questions above, pick specific items from the 'Opportunities' box that you would like to implement in your organization for the upcoming semester/year. Start with one and you can always return and repeat this process. You will use these to develop your SMART goals.

**TRANSITION**
- Now that you have selected item(s) from the opportunity box, we will move into turning these into SMART goals for the next year.
- Can anyone share what SMART goals are?
- They are goals that are Specific, Measurable, Attainable, Relevant, and Timely!

**ACTIVITY INSTRUCTIONS**
- Using the SMART goal chart, give participants 10 minutes to individually fill out the chart using the guiding questions listed there.
- After they are done, have them share with a group of 3-4 members to discuss what they have written and solicit feedback from one another.
- Using a word document or large sticky notes, finalize your SMART goal(s) as a group.

**DEBRIEF**
- As a group have a discussion to determine how you will keep these goals at the forefront of your mind when planning for the year.
- Now that you have identified your goals, you should have a good idea on what direction your organization would like to move in!
- Make sure that this work is archived somewhere.
where you can easily access, refer back to, and transition over to the next board. It is important to share this information to new members so there is a shared understanding of goals and to prevent an organization from having to start from scratch again.

| TRANSITION |  
| --- | --- |
| • For more guidance on next steps and developing plans that align with your goals, check out our guide called: So you have an idea, now what? | TIME: 1 min |

| Assessment |  
| --- | --- |
| • Please have participants take a moment to fill out this quick assessment to help our office continue to build curriculum that is helpful for you and your group!  
• bit.ly/LeadAtDuke) |  