

Unit 3 Small Group Exercise

Establishing Goals and Objectives for Your BRE Program

Read “Measuring Success in Your BRE Program” and “Developing Smart Goals for Your Organization.” Using the terminology and definitions provided in that publication, identify three (3) goals for a BRE Program. For each goal identify an objective. Identify an activity, indicator, measure, unit and baseline for that objective. These goals should relate to the organization and operation of the BRE Program office, not the business visitation process.

Goal 1	
Objective	
Indicator	
Measure	
Unit	
Baseline	
Goal 2	
Objective	
Indicator	
Measure	
Unit	
Baseline	
Goal 3	
Objective	
Indicator	
Measure	
Unit	
Baseline	

Business Retention and Expansion (BRE) Programs: Measuring Success in Your BRE Program¹

Henry M. Cothran²

Introduction

What gets measured gets done – Peter Drucker

When communities, businesses, and organizations realize they need a vision for the future and a road map for how to get there, a typical response is to initiate a strategic planning process (Cothran and Clouser 2006). Many go so far as to set goals and write a plan. Some will implement their plans by completing projects; some will not. Even fewer will go so far as to develop indicators of success, collect baseline data, and implement a process to measure progress toward achieving the goals of their plan.

One of the reasons people or organizations fail to evaluate their programs is because the process can sometimes be quite mystifying. Terms like outcome, objective, or strategy are used interchangeably, leading to confusion on the part of those who are involved in the process. Another reason organizations skip the evaluation part of planning is because successful completion of a project is “good enough” and very little attention is paid to questioning whether or not the activity actually moved the organization closer to its desired outcomes.

This publication is ninth in a series on establishing Business Retention and Expansion programs. The publications in this series can be found online at the EDIS website at http://edis.ifas.ufl.edu/TOPIC_SERIES_BRE.

Measurement Guidelines

Not everything that can be counted counts and not everything that counts can be counted – Albert Einstein

Decide What Can and Should Be Measured

Some measures might be easy to collect but provide little information about whether an activity actually moved the program toward accomplishment of a goal. On the other hand, some measures might be very useful but be impossible to collect. It is important to balance the need to know with the ability to find out. You make this decision based on available resources, including time, money, and the relative value of the information.

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Choose the "Real" Measure of the Goal

If your goal is to keep young people from leaving the community by providing more local jobs, a measurement as simple as increasing total employment is probably not a good indicator. If the job increase is solely attributable to increases in part-time, minimum wage jobs, that may not really be the desired outcome. A measure such as the increase in manufacturing jobs might be better.

Focus on Positive Outcomes

An increase in employment in a community may also be an indicator that unemployment decreased. So which measure should be reported? Both measures involve value judgments, but increasing jobs may be viewed as the more positive measure to report.

Measure the Progress; Don't Count Activities

If your goal is to revitalize the downtown, the number of meetings on this topic is not a measure of progress, but a count of activities. Measuring the number of merchants who initiate recommended actions is a more appropriate measure (albeit a more expensive one to collect).

Conduct Intermediate "Checks" on Progress

Using this same illustration, it would be acceptable to report that a number of workshops were conducted because these provide evidence that you are on track toward achieving your overall goal. You might also evaluate the content, timing, and location of specific workshops to determine changes that need to be made to increase merchant involvement.

Balance the Number of Measures

There is no "correct" number of measures for any one goal. The only constraints are dictated by the time and effort needed to identify the baseline information, and the resources (personnel, time, and money) to track and collect the information needed to document change in the measure. To this end, it also helps to have a limited number of clearly stated measures that are easily related to the goal to be achieved.

Use Commonly Accepted and Clearly Defined Measurement Terms

In evaluation literature, it is not uncommon to see various measurement activities called by more than one name. For example, one guide might define the term "goal" the same way another guide defines "outcome" or "objective." Thus it is important to use agreed upon terminology and definitions. Table 1 defines the most common terms used in developing a series of measures for your business retention and expansion (BRE) program. Using these terms as they are defined in this table provides you and your BRE partners and team members with a common language for the process of evaluating progress and success.

Use a Checklist

You cannot manage what you cannot measure – Lord Kelvin

Most programs identify one or more goals before considering how success might be measured. It is important, however, to keep in mind that measuring success must begin before activities are undertaken because a baseline from which to measure change must be identified. Evaluation must also take place throughout the life of the program. With that in mind, it may be useful to establish a measurement checklist to ensure that your program establishes measures for a logical and complete process. Table 2 illustrates a checklist that can be followed for each goal in the program.

Conclusion

It is important to demonstrate that your BRE program is producing results for the community. This information is important for the BRE program leader, partners, funders, business owner/operators, and the community as a whole. Understanding how to select measures and collect information to evaluate the success of your program is a key characteristic of successful BRE programs. Using agreed upon language, a logical process, and a balanced number of measures can make your program more productive and successful.

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Table 1. Common terms used to develop BRE program measures.

Term	Definition	Example
Goal	A goal is the condition the program wants to achieve. It should be specific, measurable, attainable, relevant, and time-bound.	Continually identify and train new visitation team members
Objective	An objective is a measurable result that must be achieved (typically within one year or less) to achieve the objective.	Train 10 team members this year
Activity	An activity is the effort that is undertaken to achieve the objective.	Training sessions
Indicator	An indicator is something that must be changed or achieved by the activity in order to claim progress toward the goal.	Total number of team members
Measure	A measure is how you count or value the status of an indicator.	Change in team members
Unit	A unit defines what is counted.	Team members trained
Baseline	The baseline defines the value of a measure at the starting point.	Team members at the beginning of the year

Table 2. BRE program goal checklist.

Check Mark	Program Goal
	What is the goal?
	What are the objectives related to the goal?
	What activities are related to the objective?
	What is the indicator that must be achieved?
	How will you measure the status of the indicator?
	What is the unit of measure related to this indicator?
	What is the baseline value for this measure?
	Will there be opportunities to do intermediate checks?
	Where is the information?
	How will this information be obtained?
	Who will collect the information?
	How many hours will it take to collect the information?
	Will they be paid to collect the information?
	When will the information be collected?
	How will progress from the baseline be measured?
	How can this information be used to achieve the program's goal?

Developing SMART Goals for Your Organization¹

Henry M. Cothran and Allen F. Wysocki²

“You’ve got to be very careful if you don’t know where you’re going, because you might not get there.” – Yogi Berra

“Goal setting is one of the basic tools used by organizations to assist in setting a direction and achieving it. Successful organizations often set long- and short-term goals for service development, improving quality, reducing errors, becoming more customer-focused, and building better internal and public relations.” – Jeffery Davis, *Managing and Achieving Organizational Goals*

Individuals may set goals to achieve a personal objective such as career advancement. This publication is designed to introduce a sequential process for setting goals. It begins by defining a goal and identifying reasons for setting goals. It then describes a process based on the acronym SMART for developing and implementing goals.

Defining "Goal"

A goal is a statement of a desired future an organization wishes to achieve. It describes what the organization is trying accomplish. Goals may be strategic (making broad statements of where the organization wishes to be at some future point) or

tactical (defining specific short-term results for units within the organization). Goals serve as an internal source of motivation and commitment and provide a guide to action as well as a means of measuring performance (Barton, 2000). Defining organizational goals helps to conceptualize and articulate the future direction of the organization, thus allowing those responsible for setting that direction to develop a common understanding of where the organization is heading. Goals provide a way of assuring that an organization will get where it wants to go.

Setting Goals

How goals are set is as important as the goal itself. Thus it is important that goals meet specific criteria that can be used to easily assess them. One way of doing this is to use the acronym “SMART” as a way of evaluating the goal. An internet search for “SMART” goals yielded some 6.7 million hits. One of those hits, Measure-X.com said that “the origin of the acronym is lost, and the specific traits are not universally agreed upon, [but] SMART goals still provide a great framework to improve your goal setting and help you create more effective goals.” A further search of the first forty websites found that most used the following words to define a “SMART” goal:

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- Specific
- Measurable
- Attainable
- Relevant
- Time-bound

Specific

A goal is specific when it provides a description of what is to be accomplished. A specific goal is a focused goal. It will state exactly what the organization intends to accomplish. While the description needs to be specific and focused, it also needs to be easily understood by those involved in its achievement. It should be written so that it can be easily and clearly communicated. A specific goal will make it easier for those writing objectives and action plans to address the following questions:

- Who is to be involved?
- What is to be accomplished?
- Where is it to be done?
- When is it to be done?

Measurable

A goal is measurable if it is quantifiable. Measurement is accomplished by first obtaining or establishing base-line data. It will also have a target toward which progress can be measured, as well as benchmarks to measure progress along the way. A measurable goal will answer questions such as:

- How much?
- How many?
- How will you know when it is accomplished?

Attainable

There should be a realistic chance that a goal can be accomplished. This does not mean or imply that goals should be easy. On the contrary, a goal should be challenging. It should be set by or in concert with the person responsible for its achievement. The

organization's leadership, and where appropriate its stakeholders, should agree that the goal is important and that appropriate time and resources will be focused on its accomplishment. An attainable goal should also allow for flexibility. A goal that can no longer be achieved should be altered or abandoned.

Relevant

Goals should be appropriate to and consistent with the mission and vision of the organization. Each goal adopted by the organization should be one that moves the organization toward the achievement of its vision. Relevant goals will not conflict with other organizational goals. As noted earlier, goals are set by or in concert with the person responsible for achievement. It is important that all short-term goals be relevant (e.g., consistent) with the longer-term and broader goals of the organization.

Time-bound

Finally a goal must be bound by time. That is, it must have a starting and ending point. It should also have some intermediate points at which progress can be assessed. Limiting the time in which a goal must be accomplished helps to focus effort toward its achievement.

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