



SMART Goals and Strategy Breakdown

Behavioral Health Recruitment and Retention

August 10, 2023 | 12-1 p.m. PT



Indigenous Land Acknowledgement

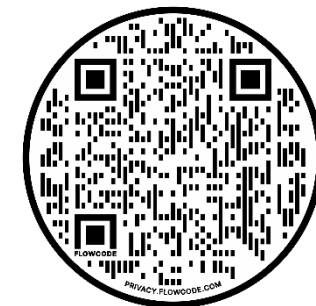
- We respectfully acknowledge that we live and work in territories where indigenous nations and tribal groups are traditional stewards of the land. Our California office resides in Tongva territory.
- Please join us in supporting efforts to affirm tribal sovereignty across what is now known as California and in displaying respect, honor, and gratitude for all indigenous people.

Whose land are you on?

Option 1: Text your ZIP code to 1-907-312-5085.

Option 2: Enter your location at <https://native-land.ca>.

Option 3: Access Native Land website via QR Code.





Advocates for Human Potential, Inc. (AHP) BHRR Team



Kathleen West
BHWD Project Director



Tammy Bernstein
BHWD Deputy Project Director



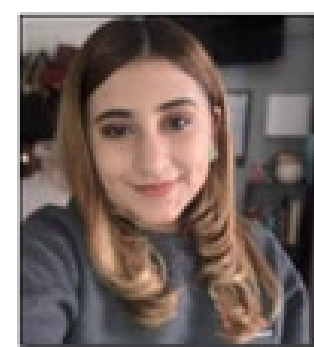
Lorena Nevile
BHRR Deputy Project Director



Cklara Moradian
Lead Grantee Coach



Roxanne Brooks
Grantee Coach



Rosy Larios
Grantee Coach



Cherice Cooley
Operations Specialist



Caitlin Storm
Quality Assurance Coordinator



Kate Cox
BHWD Operations Manager



Kayla Halsey
BHWD Data & Analyses Manager

This project would not be possible without the many amazing people who work in the background but are not on this slide.

AHP Workforce Development (WFD) Subject Matter Expert (SME) Team



Susan Lange
*WFD SME & Sr. Program
Manager*



Allen Fowler
*WFD SME & Senior
Writer*



Kweilin Waller
*WFD SME & Sr. Program
Manager*



Martina Durant
*WFD SME & Sr. Program
Manager*

Agenda

1. Overview of BHRR Goals
2. Strategies
3. Multistep Framework
4. Needs Assessment and Capacity Building Survey
5. Define Desired Outcomes
6. Vision, Mission, Goal Statements
7. Developing SMART Goals
8. Developing SMART Objectives



Overview of BHRR Goals

Improve	Improve BH organizations' knowledge and implementation of best practices in BH workforce development and change management.
Strengthen	Strengthen BH organizations' capacity to effectively recruit and retain skilled staff through identification and deployment of specific strategies in their organizations.
Increase Diversity	Increase the diversity of the BH workforce through an array of strategies to better reflect the individuals in need of service.
Long-term Strategy	Increase BH organizations' sustainability and their ability to respond to changing environments by supporting their development of and adherence to longer-term strategic plans.



Recruitment and Retention Strategies Selection

Recruitment

- Diversity, Equity, Inclusion, Justice, Belonging+ (DEIJB+)
- Human Resource (HR) Improvements
- Pipeline Creation
- Leveraging Technology for Recruitment
- Marketing and Branding

Retention

- Diversity, Equity, Inclusion, Justice, Belonging+ (DEIJB+)
- Workplace Culture
- Workplace Wellness
- Workforce Development
- Improving Benefits
- Leveraging Technology for Retention

AHP's 5 Steps to Building a Stronger BH Workforce



- Step 1: Assess
- Step 2: Analyze
- Step 3: Develop
- Step 4: Implement
- Step 5: Evaluate



Needs Assessment and Capacity Building Survey



Capacity building and needs assessment are simplified into one document.



Note that this is intended to serve as a starting point to begin the multistep framework.



The needs assessment portion is designed to provide a general idea of which categories it is recommended that your organization focus on to complete the multistep framework.



The capacity building portion is to identify strengths for building blocks to leverage to begin working on your areas of needed growth.



Needs Assessment and Capacity Building Survey

Section I of the capacity building survey is the capacity building/needs assessment.

The Needs Assessment Guide is broken down into three categories to align with the BHRR strategies. These categories are:

- Organizational development: 6–24 points
- HR improvements and pipeline creation: 4–16 possible points
- Workplace culture: 2–8 possible points

The questions are rated on a scale of 1 to 4. They are scored on the following scale:

1. Low capacity
2. Basic capacity
3. Moderate capacity
4. Strong capacity

The final scoring scale ranges from 12 to 48. The lower the number in a certain category indicates your organization may need to do some assessment in these areas.

Section II

This section is a survey for baseline data purposes to measure the success of the project at different intervals.

Now that areas of focus have been identified in the survey, organizations can begin to work on the multistep framework.

References

Angeline, M. (2022, June 17). How Capacity Building Can Shock-Proof Your Organization. *Runn*. [What is Capacity Building? | Runn](#)

Team Asana. (2022, November 15). *What is a needs assessment? 3 types and examples*. [What is a Needs Assessment? 3 Types and Examples \[2023\] • Asana](#)

US Aid. (2015, July 27). *Organizational Capacity Assessment (OCA) Non-Facilitator's Guide Version with NUPAS Items*. [ocawithoutfacilitatorsguidewithnupas_7.27.2015.docx \(live.com\)](#)

Defining Desired Outcomes



Step 1: Identify desired outcomes using the needs and capacity assessment.



Step 2: Elicit input from priority populations, partners, and stakeholders regarding desired outcomes.



Step 3: Develop mission, vision, and goal statements for the intervention(s).



Step 4: Develop specific, measurable, achievable, realistic, and time-bound (SMART) objectives.

Vision, Mission, Goal Statements



- **Vision Statement:** Brief description of where the program will be in the future—usually three to five years.
- **Mission Statement:** Distinctive purpose of a program. This can be a one-sentence statement or short narrative.
- **Goal Statement:** SMART statements of desired program outcomes. Specify priority population and include action words (e.g., reduce, increase, eliminate).

Comparison of Mission and Vision Statements

Mission Statement

- Statement: purpose of the organization
- Oriented to making decisions, priorities, and actions of the organization
- Questions to ask:
 1. Why does your organization exist?
 2. What is the broadest way to describe the work of the organization?
- **Example:**
 - “Literacy Foundation: To promote reading and financial literacy among the adult population in Los Angeles County.”

Vision Statement

- Statement of the desired end state
- Oriented to the group meeting the results of the organization
- Questions to ask:
 1. What needs to be changed?
 2. What does success look like?
- **Example:**
 - “The mission of Generations’ employee wellness program is to improve the health status of our employees.”

Developing SMART Goals

SMART Goals are:

- **S**pecific: Well defined, clear, and unambiguous.
- **M**easurable: With specific criteria that measure your progress toward accomplishing the goal.
- **A**chievable: Attainable and not impossible to achieve.
- **R**ealistic: Within reach, realistic, and relevant.
- **T**ime-bound: With a clearly defined timeline, including a start date and a target date; the purpose is to create urgency.



Specific SMART Goals



Goals that are specific have a significantly greater chance of being accomplished. To make a goal specific, consider the five “W” questions:

- Who: Who is involved in this goal?
- What: What do I want to accomplish?
- Where: Where will I achieve this goal?
- When: When do I want to achieve this goal?
- Why: Why do I want to achieve this goal?

Measurable SMART Goals

A SMART goal must have criteria for measuring progress. If there are no criteria, you will not be able to determine your progress and whether you are on track to reach your goal.

To make a goal measurable, ask yourself:

- How many/much?
- How do I know if I have reached my goal?
- What is my indicator of progress?



Achievable SMART Goals



A SMART goal must be achievable and attainable. This will help you figure out ways you can realize that goal and work toward it. The achievability of the goal should be stretched to make you feel challenged, but defined well enough that you can achieve it. Ask yourself:

1. Do I have the resources and capabilities to achieve the goal? If not, what am I missing?
2. Have others done it successfully?

Realistic SMART Goals

A SMART goal must be realistic in that the goal can be realistically achieved given the available resources and time. A SMART goal is likely realistic if you believe that it can be accomplished.

To make a goal realistic, ask yourself:

1. Is the goal realistic and within reach?
2. Is the goal reachable, given the time and resources?
3. Are you able to commit to achieving the goal?



Time-bound SMART Goals

A SMART goal must be time-bound in that it has a start and finish date. If the goal is not time-constrained, there will be no sense of urgency, and therefore, there will be less motivation to achieve the goal.

To make a goal time-bound, ask yourself:

1. Does my goal have a deadline?
2. By when do you want to achieve your goal?



Developing SMART Objectives/Action Steps



- Develop Specific, Measurable, Attainable, Realistic, Time-bound objectives:
 - Small, specific factors that enable the goal to be met.
- Written objectives should include:
 1. What will change (outcome).
 2. When or under what conditions the change will occur.
 3. Who will change.
- Program objectives should be relevant to program goals. There are many types of objectives including:
 - Process objectives.
 - Impact objectives (i.e., learning, behavioral, environmental).
 - Learning objectives.
 - Behavioral objectives.
 - Environmental objectives.

Hierarchy of SMART Objectives

Type of Objective	Program Outcomes	Possible Evaluation Measures
Process objectives	<ul style="list-style-type: none"> Activities presented and tasks completed 	<ul style="list-style-type: none"> Number of sessions held Attendance Participation Staff performance Adequacy of resources Tasks on schedule
Impact objectives <ul style="list-style-type: none"> Learning objectives Behavioral objectives Environmental objectives 	<ul style="list-style-type: none"> Change in awareness, knowledge, attitudes, or skills Change in behavior Change in environment 	<ul style="list-style-type: none"> Increases in awareness, knowledge, attitudes, or skill development Modifications or discontinuation of current behavior or adoption of new behavior Measures associated with economic, service, physical, social, psychological, or political environments
Outcome objectives	<ul style="list-style-type: none"> Change in quality of life, health 	<ul style="list-style-type: none"> Quality of life measures, social benefits, and measures of risk

Examples of SMART Objectives/Action Steps

Example—SMART Goal: By September 2024, our management team will have developed and executed a Diversity, Equity, and Inclusion (DEI) plan that includes input from staff at multiple levels to ensure we increase employee engagement and success.

- Process Objective: (Activities tasks that will be completed)
 - The management team will hire a DEIJB+ consultant/subcontractor by December 2023, to enhance and finalize the proposed DEI plan to ensure it encompasses the mission and vision of the staff and organization.
- Impact Objective: (Change in attitude/awareness)
 - The program manager will develop a DEI survey and sent it out to multiple level of staff by November 1, 2023, to gain insight into staff perspectives regarding DEI in our organization, what is lacking, and what changes would they like to see.
- Outcome Objective: (Quality of life/health)
 - By the end of the grant period, December 31, 2024, our organization will have a 25 percent increase in employee engagement and success, and this data will be measured by a pre- and post survey.

Next Steps After Defining Desired Outcomes

- **The following are best practices for next steps, but not required for this grant.**
 - Use desired outcomes to:
 - Develop/implement appropriate planning modules for intervention.
 - Create a logic model necessary for program implementation.
 - Assess effectiveness of proposed interventions to achieve desired outcomes.
 - Adopt, adapt, or develop tailored interventions (evidence-based practices).
 - Develop a plan for acquiring required tools and resources for effective program implementation.
 - Conduct a pilot test of interventions.
 - Evaluate the program.

Summary

- Based on your needs and capacity assessment:
 - Identify strengths, weaknesses, and available resources of the organization, and the needs of the priority population.
- Recruit interested partners and stakeholders to support and develop the program.
- Develop the mission, vision, SMART goals, and objectives, and create or adapt intervention strategies.
- Strategies selected must be robust and effective enough to ensure the stated objectives have a reasonable chance of being met.
- Locate resources needed to implement and evaluate the program, plan for delivery, and address influencing factors.
- Utilize objectives to consider the process for program evaluation.



Questions?

Please enter questions in the Q&A box and/or send them to CA_BHRR@ahpnet.com and/or your grantee coach.





“

Thank you!

”