

CLAS Toolkit

Worksheet 1: Goal Planning

Goal setting is essential for any performance improvement project. It helps clarify your purpose, design your impact measurement, and focus your action planning. This worksheet is intended to help establish appropriate goals for performance improvement projects.

You may have heard of SMART goals in the past. Still, without an explicit equity and inclusion component, well-intentioned improvement goals may widen disparity gaps by leaving marginalized community members behind. For that reason, we are now using SMARTIE goals!

SMARTIE stands for:

Specific	Measurable	Attainable	Relevant	Time-Bound	Inclusive	Equitable
S	M	A	R	T	I	E
What exactly do you want to achieve?	How will you know you've achieved it?	Is it possible to achieve?	Is it aligned with strategic plans?	How soon will it be achieved?	Who is impacted and involved?	How will it address inequities?

By incorporating inclusion and equity into your goals, you can ensure tangible and actionable steps demonstrate your organization’s commitment to these goals. These SMARTIE goals should be specific to your community and informed by your organization’s needs. SMARTIE goals are about including marginalized communities in a way that shares power and leads to more equitable outcomes.

Here’s an example of a CLAS-related goal turned into a SMARTIE goal:

Good Goal	Better SMART Goal	Best SMARTIE Goal
We will begin offering translation services.	We will offer translated materials in Spanish by October of this year.	Translation: Our CLAS leadership council will lead a project to identify which language (other than English) is spoken most by our patients and, by December 31, 2025, work with key partners (such as clinic leadership, staff, and LEP patients) to translate and promote the 10 most frequently used (written) resources into that language.

Writing Your SMARTIE Goal

Use the spaces below to help you brainstorm and refine a SMARTIE goal.

What **Specific** outcome are you trying to achieve? What is the desired impact? *Consider how this goal connects to your organization's CLAS assessment results from Section II.*

What **Measure(s)** will you use? What data source(s) you will use? If the impact is more long-term, what near-term measures might indicate that you are on the right track? *Consider survey results, shifts in demographic data, or even informal feedback from the community, patients, or staff.*

What is your ambitious yet **Attainable** benchmark(s)? Is it impossible or unreasonable to attain and maintain? Is it set too low and not challenging enough?

How is this goal **Relevant** and related to our overall strategic plan or priorities? Is it realistic, given our current resources?

Time-bound: This project's timeline is between _____ (start date) and _____ (end date).
In many scenarios, specifying the end date is sufficient.

How will you make this project **Inclusive**? Who will be affected within our organization? Who will be affected outside of our organization? How will you include impacted patients and/or groups in co-designing the goal and project? How might this project be exclusive, and how might you address it?

How will this project ensure that the impact and outcomes are **Equitable**? Is there the possibility of any unintentional *disparate impact* along the lines of power and/or identity? How else might inequity show up? For whom? How can you mitigate or eliminate differences in who and how it impacts marginalized populations?

Write a draft of your **SMARTIE goal** here:

Write your final **SMARTIE goal** here: