

System and Organizational Goal Setting: A SMART Approach

Why Set Goals?

Effective goal setting drives a customer-centric healthcare organization, improves the care encounter, and unites leaders toward a common goal. Clients know their history and organization best. In turn, NRC Health has over 30+ years of industry experience and a track record of successful goal setting with our clients that leads to an accelerated rate of improvement. Therefore, joining together maximizes your goal setting process.

NRC Health recommends the following steps for success:

1. Obtain buy-in from leadership, staff, and key stakeholders
2. Promote engagement and accountability
3. Create organizational alignment
4. Set SMART goals
5. Keep it simple by focusing on 2-3 items
6. Focus on behaviors and monitor progress regularly
7. Celebrate success

Getting Started: Obtaining Organizational Buy-In

A successful goal-setting program begins with strong support by top leadership to establish the direction. An Executive Champion from the senior leadership team should be selected to:

- Set the tone for the organization and work with front-line leaders to educate, communicate, and drive experience feedback utilization to improve customer-centric care.
- Remove project barriers and establish parameters (e.g. budget neutral, project scope).

Promoting Engagement and Accountability

It is critical to know the audience when seeking buy-in. Steps to facilitating engagement include:

- Determining early who needs to be involved.
- Involving departmental staff who are upstream and downstream from the project. These individuals are additional champions, break silo thinking, and identify the potential impact to other areas.

Creating Organizational Alignment

Cascading goals helps individuals contribute to the big picture of the system/facility while also seeing gains in their area. Goals should be set for each organizational level (system, facility, unit/clinic, and provider) and based on the desired percent positive improvement rather than a score. The top of the cascade will be more difficult to shift than lower levels, therefore the goals being set should become more aggressive the closer it is to the patient.

Setting SMART Goals

To ensure all goal setting components are considered they should be SMART: Specific, measureable/manageable, achievable, realistic/relevant, and time bound (Appendix 1).

The goal magnitude for achievement depends on the context. At higher levels of performance, incrementally, it can be harder to improve. Reviewing your top unit(s) performance levels, the historical rate of change, and the organizational ability to be nimble in driving improvements are all important considerations. **For patient experience data, a 2-5 point improvement over a 12-month period for behavioral based questions is realistic.**

Keeping it Simple: Focusing on 2-3 Items

Organizations often have competing priorities. Simple questions can help determine the best use of resources when selecting projects:

- How does the project align with our strategy?
- What are the organizational key recurring issues?
- Where are quick-wins achievable or needed to gain momentum?

Narrowing to 2-3 items allows for consistent messaging, greater project control, and improves accountability with a continuous project spotlight. Long term gains are created by hardwiring and sustaining improvements over time. Most importantly, NRC Health can provide targeted recommendations that are best practice and known to improve scores.

Focusing on Behaviors and Monitoring Progress Regularly

Improvements should be tracked throughout the project to identify their impact and quick fixes should be done early for momentum. Data monitoring helps understand the “why” when shifts occur. For example, did something become added to a process or were old habits adopted? If the improvements were tracked, it becomes an easy checklist to discover what happened.

A project team may remain intact short-term after improvements are completed to monitor for sustainability. Once improvements are hardwired, the project is handed over to a manager or director that oversees the project on a day-to-day basis.

Celebrating Success

Celebrating success breathes life into the project team and organization. Not all improvements are easy or fast and celebrating project successes carries teams through the times of real effort. Sustaining successful improvements is a win for all by making work easier and supports the reason we went into healthcare--to build connections, to have meaningful and be recognized for accomplishments, and to make a difference in the lives of patients and their loved ones.

Appendix 1. Patient Experience Goal Setting Worksheet

| Focus Area/Composite/Dimension (CAHPS, Real-time, etc.): | Baseline (FY _____ Score) | Goal (FY _____) |
|--|------------------------------|--------------------|
| Measures | | |
| Question 1: | | |
| Question 2: | | |
| Question 3: | | |

Is Your Goal SMART?

| Item | Elements to Discuss and Assess |
|--------------------------------|---|
| S pecific | → Is the Goal Specific? |
| M easurable | → Can it be measured? → Is it the right measure for the Focus Area, or am I just using what's available? |
| M anageable | → Am I focusing on too much or is it a manageable sized project for improvement? |
| A chievable | → Is it a stretch, yet achievable? → How do I know? |
| R ealistic and Relevant | → Would people commonly agree that this is a worthwhile project? → Does this project directly impact the patient? → What could I expect to see if it's successful? → How does this align with the organizational strategy? |
| T ime bound | → What is the start and stop of the process that's being looked at? → By when are we expecting the goal to be met? (Timeframe in months) |

Project Plan

| | | | |
|--------------------------------|--|--|--|
| Project Executive Sponsor: | | | |
| Project Team | | | |
| | | | |
| | | | |
| Projected Project Start Date: | | | |
| Anticipated Project End Date: | | | |
| Scheduled Project Review Dates | | | |
| | | | |
| | | | |

Improvement Initiatives

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|---------------------------|-----|-------------|
| Improvement Initiative #1 | | |
| Task | Due | Assigned To |
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| | | |

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|---------------------------|-----|-------------|
| Improvement Initiative #2 | | |
| Task | Due | Assigned To |
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|---------------------------|-----|-------------|
| Improvement Initiative #3 | | |
| Task | Due | Assigned To |
| | | |
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