

FRACTURED ATLAS

Guidebook

SETTING GOALS AND MEETING THEM

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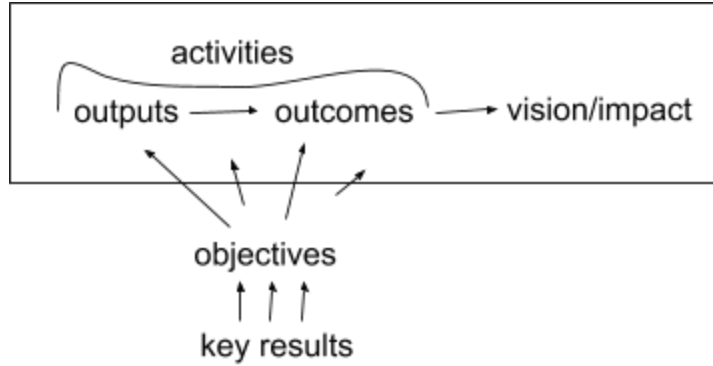
Empowering Ideas, From Vision To Action

Introduction

Maybe you have just an idea, or maybe you've been working on one for decades. You might have plenty of funding, or none at all. Maybe things have not gone as planned, and you need to reorganize. No matter what your situation is, if you are ready to dive in and connect the day-to-day with the deeper purpose of your work, you're in the right place.

One of the things that makes setting goals so difficult is that the world is constantly changing. At Fractured Atlas, we know this first-hand, and as we have evolved over the last two decades, we have seen all kinds of change. From our early days in the theatre world to crowdfunding, fiscal sponsorship, and more, our organization has used processes like the ones outlined here to stay nimble and support artists and arts groups across the country.

This pocket guide can be used by an individual, partnership, collaborative group, or an established nonprofit organization. (For our purposes, we'll call you an "organization.") The reflective aspects of this process, in particular, can be useful at almost any stage of an organization's life cycle. Centering your work around a specific vision will give you space to nimbly iterate on your activities to increase your impact.



The guide is structured as a workbook, and thoughtful participation is essential. At the same time, remember: none of this is set in stone. Step by step, we will help you create **a vision of your impact, a Theory of Change, vision-driven goal-setting process, and your first set of actionable goals.** Don't hesitate to test and iterate on this process along the way to make it work for you and your organization. We at Fractured Atlas can't wait to see what you accomplish!

Part One: Defining Your Vision

Whether you are starting from square one or have years of experience as an organization, it is essential to define a vision of what you would like to accomplish. It needs to be something you *believe* in. Basically, a vision is a statement of what you would like to see. Here's an example: "A world without wars." Or maybe, "A community where everyone is respected." Or "A sector that values artists' labor." There are endless opportunities, but none of us have endless time. We have to narrow our focus on things that we, as an organization, can do.

Reflection

Let's take a moment to prepare ourselves for this work. If it has been a hectic day or you are feeling too stressed or busy for this, consider closing your eyes and taking a few slow, deep breaths. If you have any self-care methods of any kind, you might take a few moments to engage with that practice to focus in on this guide. If you are still feeling distracted, it may be

that now is not the best time to start this workbook, and that is okay—plan to make time for it later.

Reflection is essential for us to think deeply about our work. Part of building a vision of the future is thinking critically about the past and present, without judgement of yourself or others on your team. Below are a few exercises to get you started.

Optional: Group Reflection

Doing this activity as a group? Ask each team member to complete the workbook on their own. After each part, reconvene to discuss your responses!

Two Minute Free Write

How are you feeling about your organization today? What about it is stressful? What about it makes you feel good?

Looking Back

What have you and/or the organization accomplished in the last year? List everything you can think of, no matter how big or small.

Tell a Story

Tell us about the time that you were proudest of your organization's work.

Core Value Word Bank

Based on your own personal experience, circle the five most important values that at the core of your organization and how you work. If any core values are missing for you, feel free to add your own. (Note: these are not the themes of artistic or charitable work, but rather the core values of how you work as an organization.)

| | | | | |
|-----------------|--------------|----------------|----------------|----------------|
| Commitment | Efficiency | Loyalty | Accountability | Comfort |
| Trust | Power | Curiosity | Purpose | Kindness |
| Innovation | Respect | Empathy | Confidence | Productivity |
| Gratitude | Adaptability | Hard work | Independence | Health |
| Generosity | Achievement | Transparency | Beauty | Structure |
| Accuracy | Timeliness | Selflessness | Skillfulness | Sustainability |
| Decisiveness | Community | Learning | Cleanliness | Compassion |
| Communication | Vision | Tolerance | Equality | Creativity |
| Stability | Unity | Fairness | Patience | Justice |
| Consistency | Growth | Support | Teamwork | Discipline |
| Organization | Spirituality | Fun | Openness | Wisdom |
| Risk | Balance | Security | Toughness | Dependability |
| Professionalism | Bravery | Responsibility | Cooperation | Integrity |

How do these values manifest in your day-to-day work?

Your Organization's Ideal Future

What would the world look like if your organization accomplished everything it set out to do? How would certain communities or systems be different from how they are now? How would things work if your team completed every project, every goal, met every outcome, solved every problem and, even if only for a moment, had absolutely no more work to be done?

Share 7 statements about this imaginary future.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

Establishing a Vision

Thanks for indulging us! The above reflections are super helpful and will form the basis of the next step, establishing a vision for the organization. As we move forward, keep your perceived core values and proud moments

in mind. These principles and emotions have an important part to play in the development of your organization's work.

At the end of this section, you will have your first draft of a new Vision Statement for your organization. **A vision statement declares the impacts you want to see, and scope at which you hope to see them.** Starting with the vision statement comes from the belief that before we determine the "what" and the "how," we need to start with the "why."

Be bold! This is all about your ideas and dreams for the organization. Remember the last reflection question. What will the world look like when all your work is done?

We'll start with your seven answers to "Your Organization's Ideal Future" above and work to place it within this framework:

We envision a _____
that (1) _____,
(2) _____,
(3) _____,
and (4) _____.

The first blank is an opportunity to define the scope of your desired impact. For the United Nations or Human Rights Watch, it may be the entire world. For other organizations, it is a specific community, defined by geography, identity, background, interests, or any other number of defining features. You can consider culture, society, county, state, profession, neighborhood—you choose the breadth of your impact.

How would you describe your organization's focus or scope? Be as specific as possible—not every section will have an answer!

| Geography | Community | Identity/ Background | Other |
|-----------|-----------|-------------------------|-------|
| | | | |

The other three blanks define the impact you envision for your organization. There can be any number of these, but we encourage you to limit yourself to no more than four.

Recap

Let's start by restating the seven statements you shared in the exercise "Your Organization's Ideal Future." Feel free to make small revisions. Remember: these realities would make it so that your organization would have no reason to exist.

| |
|----|
| 1. |
| 2. |
| 3. |
| 4. |
| 5. |

6.

7.

Synthesizing Ideas

How do you think these 7 statements can be combined? Could you say it all in three phrases? In four? In just one? Go ahead and give it a try in the workspace below. Have fun with it! But don't spend more than five minutes trying to synthesize before moving on.

Now, let's fill in your first draft of a Vision Statement!

We envision a _____ *(scope)* _____

that (1) _____,

(2) _____ *(if required)* _____,

(3) _____ *(if required)* _____,

and (4) _____ *(if required)* _____.

Hooray! You did it! It may not be perfect or polished, but it's a start. It's okay to feel good about it. Just like we do in the example below, we can continue

to revise the vision statement. Putting together the first draft is the hardest part.

Example 1: Peanut Butter & Jelly

Sawyer is starting an organization and loves peanut butter and jelly sandwiches. Sawyer loves this classic sandwich so much that Sawyer thinks everyone should have one (using Nana's secret recipe of course). The strategy could be to put a card table on the front stoop and give a few away, open up a storefront in the neighborhood and sell some, or could even start with a food truck or YouTube channel. There are many potential strategies for spreading the love of PB&J. Sawyer needs to decide what it is that they really want to do.

Let's say we team up with Sawyer and decide to start a charitable peanut butter and jelly sandwich shop, UPB&J. We're starting small, so let's set up shop in our neighborhood. There are sometimes passersby, but mostly we serve our neighbors. Already, we have defined the scope of our work:

"We envision a neighborhood that..."

Now, UPB&J is a charitable enterprise. We aren't trying to turn much of a profit, so our markup is insignificant. We're battling hunger, after all! And bringing joy to those who eat our work. The sandwich shop is also a great place for neighbors to connect with one another. Let's try and fill in the rest of our vision statement:

We envision a neighborhood that feels interconnected, supports each other, feels no hunger, and that loves to share the joy of sandwiches.

Now that we have the hang of it, we might even go a bit further than we did with the template. Over time, you will have an opportunity to iterate on your vision statement as you learn more about your organization's impact.

Here's another version, with some perhaps-too-whimsical tweaks and additions:

We envision an interconnected neighborhood of humans, stomachs full of jelly, who support one another and whose lives are enriched by the joy of eating sandwiches with friends, neighbors, and no-longer-strangers.

Not all Vision Statements will be as jelly-filled as this one, but hopefully you've got a sense of the energy we're going for. The problem is, it has a lot of extra verbosity going on. Our vision statement needs to be more concise! Here's a better version:

UPB&J envisions a healthy and mutually supportive neighborhood that is enriched by the joy of eating sandwiches together.

Done! We can't wait to see what you're able to come up with.

Before we got started, you already knew Point A—it's you, right here and right now. Now that we have defined Point B—the impact your organization seeks—we can plan about how to get there.

Part Two: Activities, Outputs, and Outcomes

As you might already know, nonprofit organizations are also often referred to as “mission-driven” organizations. How the “mission” is defined, however, varies greatly from organization to organization. Many organizations have an outward-facing Mission Statement that lays out the ways in which it seeks to realize its Vision Statement. Some mission statements are short and pithy, while others are eloquent or run on for a few too many sentences.

No matter what organization you look at, the truth is that while they may be grounded in a mission and vision, their day-to-day goal-setting and decision-making is significantly more complicated. In this second section of the Pocket Guide, we will guide you through a brainstorming process which breaks out the “mission” into three parts, forming a “Theory of Change.” We will provide you with **a framework for (1) defining your overall activities, (2) the specific outputs of those activities, and (3) the outcomes you hope to see based on those outputs** which lead in the end to your vision. In our example, we’ll also show a way that these three elements can be recombined to create the skeleton of a Mission Statement.

Brainstorming

Before we get into the details, let’s get it all out on the page.

Current and Recent Activities

There’s plenty of space. Make a list of every recent or ongoing program that has been carried out by your organization.

Fresh Ideas

What are some activities or programs that you would like your organization to do? What are activities that you are planning for the future? Go ahead and list anything that comes to mind.

Your Theory of Change

The results of the above brainstorming activities form the first part of your “Theory of Change,” a logic model which helps you figure out the implications of your activities. A theory of change has four parts, and the fourth portion is your Vision Statement. You are already halfway done!

To get started, please fill in the activities that you plan to continue and the activities that you are planning for the future into the first box, “Activities.” Then drop your vision statement in the fourth box, “Impacts.”

| Activities | Outputs | Outcomes | Impacts |
|------------|---------|----------|---------|
| | | | |

The process of determining “Outputs” and “Outcomes” is where we put our planned activities and envisioned impacts to the test. We know the “what” and the “why,” but now we need to determine “how” our work connects them.

Outputs are clear, measurable plans for the implementation of your activities. For instance, how many workshops will an organization carry out? At how many locations? For how many people? These can be measured in terms of length, growth, or by other quantifiable methods. Feel free to add 2-3 outputs for each of your activities.

Outcomes are the specific results of successful outputs. For instance, maybe those workshops increase students' confidence. Or maybe their college admission rate is X% higher than the city average. It could also include changes in attitude or acquisition of skills. This should be quantitative where possible, but can also include qualitative or anecdotal outcomes. Add these one at a time, thoughtfully considering the potential results of the organization's work. Each should be connected with at least one of your outputs.

An important part of this process is thinking critically about the connections between your outputs, outcomes, and impacts. How certain are you that your outputs can lead to the outcomes you describe? Do the outcomes have a meaningful relation to the overall impacts the organization is seeking to make? Do the outcomes contribute to the future your organization envisions? If not, do not despair. This is an iterative process. Over time, every organization makes adjustments to their activities and theory of change. As you learn and evolve as an organization, your methods of achieving the stated vision will have to change and evolve to stay effective.

Example: UPB&J, Part Two

Let's pick up where we left off. We're starting a peanut butter and jelly sandwich shop. Here's our vision:

UPB&J envisions a healthy and mutually supportive neighborhood that is enriched by the joy of eating sandwiches together.

Our little sandwich team knows where it wants to go. Sawyer asks the next important question: how do we get there?

It's a good thing we know about Theories of Change! After an hour of work, plus a couple sandwich breaks, we finally have our first draft of UPB&J's Theory of Change:

1. Activities:

- a. making cheap but tasty peanut butter and jelly sandwiches**
- b. throwing sandwich parties**

2. Outputs:

- a. selling 20 sandwiches per day**
- b. staying open weekdays from 10am to 3pm outside of events**
- c. throwing 2 evening sandwich parties per month for up to 30 attendees per event**
- d. provide 10 sandwiches per day to the local free kitchen**

3. Outcomes:

- a. local families and neighbors have access to reasonably-priced lunches on a daily basis**
- b. neighbors know each other better, build relationships**
- c. neighbors occasionally have fun with one another**

4. Impacts:

- a. a healthy neighborhood**
- b. a mutually supportive neighborhood**
- c. a neighborhood that is joyful**

Eventually, we may find that you need to redefine some of our activities. For example, there are many ways to support anti-hunger efforts? Free food? Financial assistance? Job placement? As a business that makes sandwiches, maybe we are right to focus our anti-hunger support on what we do well: sandwiches. A key here is to refine your list of activities and focus on what is within your sphere of influence.

Bonus: Composing a Mission Statement

Sometimes, this material can also be used to draft a Mission Statement, by combining the activities and outcomes to describe the organization's

work. The mission can be written as if it follows the Vision Statement and begins with “In service of that vision...”

Here’s an example for UPB&J:

(In service of that vision) **UPB&J makes delicious peanut butter and jelly-based sandwiches for our neighbors, provides PB&Js to local programs fighting hunger, and organizes fun sandwich-focused events to bring the neighborhood together.**

As we did with the vision statement, we can make revisions to spice things up (the mission statement, not the sandwiches) and optimize the statement for the public.

For larger organizations, the mission statement may have to be less specific to cover all of the programming. It’s fine if there are some additional details that need to be added, but be careful not to add unnecessary information. Remember, this is not an “About Us” page, a short story, or a manifesto. Keep it succinct and your mission will appear focused, united, and strategically sound.

Just as we did with the Vision, let’s make our Mission Statement more concise. That way, it will be more easily digestible, more memorable, and potentially more inspiring.

UPB&J provides our neighbors with high-quality PB&J sandwiches, anti-hunger support, and a community hub for culinary events.

Now that we’ve experimented with different statements, we should reach out to our community stakeholders to see what they think (that could be a whole Pocket Guide in itself!). As we’ve said before, this is an iterative and creative process—right up your alley.

What's Next?

For a Pocket Guide about setting and meeting goals, we haven't talked about setting goals very much, have we? If you've been wondering about that, you're in luck. Part Three is the finale: Setting Meaningful Goals.

Part Three: Setting Meaningful Goals

At Fractured Atlas, one of the most important changes we made to our goal-setting process was implementing a system called Objectives & Key Results, commonly known as OKRs. There are many advantages to using a system like this, but one of the most important benefits is that **every activity, from daily chores to major, multi-year projects can be connected to the core objectives of the organization.**

Another benefit of OKRs is that they scale with you. You can use OKRs as an individual starting a new project, as a nonprofit with 40 employees, or as a major international corporation like Google. While the details of the system's implementation will vary from place to place, there are two core pieces of the process:

1. **Objectives**
2. **Key Results**

Each member of the organization will have a set of Objectives. Objectives are the higher-level goals for that person's work. These are related to the overall objectives of the organization and to the objectives of their fellow team members. At Fractured Atlas, every team member can see the OKRs of every other. Even the Leadership Team!

Objectives & Key Results must be limited to a certain amount of time. At Fractured Atlas, we update our OKRs every quarter. For you, it might be every month, every half-year, or maybe even annually. In our experience,

three months is the perfect amount of time to make significant progress on our objectives without moving beyond them into other unknown challenges.

Objectives are not necessarily measurable—in fact, like your average New Years Resolution, they are often *difficult* to measure. **This is the purpose of Key Results: to provide specific, measurable, *actionable* tasks which, when completed at least 70% of the way, will combine to accomplish the associated Objective.**

Make Your Own

Before we get too deep into the theory, let's go ahead and give it a try. In the below box, list 10-15 things that will need to be done so that you can accomplish the Outputs listed in Part Two of this guide.

It's likely that the above goals are related to one another. Using a different color, draw a line between goals that are dependent on one another. (If that bothers you, group them up in the margins.)

One of the challenges of setting up OKRs for the first time is prioritizing some objectives over others. Unfortunately, we all need to sleep, and there are only 24 hours in the day (most of the time!). Think about the next three months. What are the top three major goals that you would like to achieve? These can be big, forward-thinking, and ambitious, and should be stated as if they are already complete.

Objectives:

Example: I have a strong understanding of how Objectives & Key Results work.

- 1.
- 2.
- 3.

Next, define up to three measurable Key Results for each which, combined, should achieve the Objective.

Key Results:

Example: I have read and completed the Setting Goals and Meeting Them Pocket Book.

Objective 1

- A.
- B.
- C.

Objective 2

- A.
- B.
- C.

Objective 3

A.

B.

C.

There you have it! You have created your first-ever set of Objectives & Key Results. Now you can expand and add a few more groups of Objectives & Key Results to cover your personal work and/or the work of the organization.

At the end of the three month period for these OKRs, or at any point throughout, you can grade them, giving a percentage complete for each Key Result. The average of the Key Results provides a grade for your Objective, and if you like you can average the Objectives together to give yourself an overall grade. The goal for OKRs is to set “stretch goals” where 70% completes the task and 100% surpasses it!

If you have low percentages, it doesn’t necessarily mean that you have done a bad job. **The hidden key to meeting your goals is setting goals which are challenging but attainable and that work for you.** Sure, there are probably things that you can do differently in the work, but don’t be afraid to try new ways of setting OKRs. You might try changing the time period, the method of measuring progress, or the types of Key Results you create. At Fractured Atlas we have tried many different ways of using OKRs, and there is definitely a version of this system which can work for you.

There is a lot out there about Objectives & Key Results and how to perfect the process. Here are a few other things we have learned along the way:

- It is important to capture daily or weekly tasks within your Key Results, even if they are under an Objective like “The organization’s administration has been maintained.” Be sure to also include tasks that are already underway.
- In hierarchical organizations, individual goals can cascade up to managers’ goals, which in turn then cascade up to Organizational Objectives set by the organization leadership.
- Remember that you are aiming for 70% complete. If you get 100% complete, you’re not setting ambitious enough goals.
- When setting stretch goals, remember that a lot can happen in three months and that things rarely go as planned. The 70% goal gives you room to breathe.

Over time, you’ll come up with your own insights. Don’t hesitate to let us know what you come up with!

Example: UPB&J, Part Two

Sawyer is happy with the vision and mission, along with the Theory of Change, but now it is time to get to work. Where do we start? We can start by setting a few organizational objectives:

- 1. A space has been secured for the shop.**
- 2. We have found a cost-effective ingredient supplier.**
- 3. Our social media pages are up and running.**

There are definitely more, but we’ll look at three of them for now.

Using the organizational objectives as a guide, Sawyer will create their own set of Objectives and then add some Key Results. After talking about this as a group, Sawyer is taking the lead on the third organizational objective. Here’s one of Sawyer’s Objectives with its Key Results.

Our social media pages are up and running.

A. Facebook page has been created and has 100 likes.

B. Instagram account has been created and has 100 followers.

C. Twitter account has been created and has 50 followers.

Notice that each one of these is measurable by the combination of a yes/no question (has it been created?) and quantifiable measure of success (how many followers?).

The specifics of how Sawyer decides to measure their success is up to them, but if creating the Facebook page is 25% of the work, and they get 50 followers on Facebook, then the percentage complete might be around 62%, which is pretty good!

Once UPB&J meets its organizational objectives, it will be ready for launch! We're almost ready to transport our neighbors to peanut-butter-and-jelly heaven.

Conclusion

Congratulations! You have now built a Vision Statement, Theory of Change, and your first set of Objectives & Key Results. Thank you for your thoughtful participation and effort. We hope that you feel more confident about the connection between your day-to-day tasks and the deeper work of your organization, and more prepared to change the world in the way only your organization can.

As we said at the beginning of this guide, don't forget that **none of this is set in stone**. In this ever-changing world, don't hesitate to test and iterate on this process along the way to make it work for you and your organization. Centering your activities around a specific vision will give you space to nimbly evolve on your activities to increase your impact. We can't wait to see what you come up with.

Thanks for supporting our Workbook series. [Fractured Atlas](#) helps individual artists and arts organizations at every level of the cultural ecosystem, in every creative medium, through several programs. Let us help you [raise funds](#), [find space](#), [sell tickets](#), and [track fans](#).