

SMARTER Goal Instruction Toolkit

For Educators Facilitating the Imagination Breakout Session

Teacher Instructions

This SMARTER Goal exercise guides students through a structured, motivational goal-setting process using the 5 W's + How model.

The goal is to help students become specific, intentional, and flexible with their personal, academic, or financial goals.

Key Concepts:

- Busting the Myth: There is no perfect way to write a goal — it's a personal process.
- The 5 W's + How: These help students clarify their thinking and make goals real.
- ER – Evaluate & Revise: This teaches students how to rework their goals when life changes or obstacles arise.

Final SMARTER Goal Format:

"I want [WHAT] by [WHEN]. I will do this by [HOW] because [WHY]."

Section Title: Evaluate & Revise — Life Happens

Goals are not written in stone. Life changes — and when it does, so can your plan. That's why the final two letters in SMARTER stand for **Evaluate** and **Revise**. These are not signs of failure. In fact, learning how to *adapt your goals without giving up on them* is one of the most powerful success skills you can teach.

Instructions to Students:

- In this activity, you will see a sample goal and then be introduced to a real-life obstacle or change.
- Your task is to **revisit each of the 5 W's and the How** from your original goal:
 - Who
 - What
 - When
 - Where (if applicable)
 - Why
 - How
- Then decide what needs to be **revised** while keeping the ultimate outcome in mind.
- Finally, write your **revised SMARTER Goal** in the updated goal template.

SMARTER Goal Student Worksheet

Let's practice writing a SMART goal using the 5 W's and the How. Answer the following questions about a financial goal:

1. WHO: Who is involved in this goal?
2. WHAT: What exactly do you want to accomplish?
3. WHEN: By what date do you want to achieve this?
4. WHERE: Where will this take place? (Optional)
5. WHY: Why is this goal important to you?
6. HOW: How will you accomplish this? (Be detailed.)

Now complete your SMARTER Goal sentence:

I want _____ by _____. I will do this by

_____ because

_____.

Let's learn about the ER part of your goal.

Scenario: The Moving Target

Original Goal (student-created):

"I want to save \$600 for a laptop by December 1st. I will do this by mowing lawns every Saturday and saving \$50 per week because I want to buy my own laptop before Christmas for school and gaming."

Life Happens (The Obstacle):

In mid-October, your neighbor (your biggest mowing client) moves away, and two Saturdays in a row are rained out. You now realize you might not reach \$600 by December 1st.

Evaluate & Revise Activity:

Go back through the 5W's + How and analyze:

Prompt	Original Answer	New/Adjusted Answer
Who	Me	Same
What	Save \$600 for a laptop	Could the laptop cost less? Or reduce savings?
When	By December 1st	Can I extend the timeline?
Where	Local lawns (neighborhood)	Can I pick up other jobs at home or online?
Why	For school & gaming	Same
How	Mow lawns & save \$50/week	Try babysitting or weekend retail instead

Revised SMARTER Goal Template: Take your answers from above and rewrite the goal.

I want _____ by _____. I will do this by _____ because _____.

ER – Evaluate & Revise

If something changes, what part of your goal can be adjusted?

Use this space to reflect, evaluate, and revise your goal. Pick a scenario that might come up based upon your original goal, and practice using the process from above and Revise your goal.

Revised Goal: _____

