

Teaching Goal Setting and How to Plan

Planning is a process that involves advanced thought, preparation and commitment to a project or idea. The planning process includes deciding what is to be done, thinking through how it is to be done, identifying resources needed, identifying who is responsible and providing a schedule of completion times. Placing a plan in writing makes a formalized commitment to that plan.

Planning provides a systematic process for achieving one's goal from beginning to end. In planning, an individual works backwards from their goal by deciding what needs to be done to reach that goal by a designated time in the future.

Planning is determining what you want to accomplish, working out beforehand how it is to be done, deciding who will be responsible for each step and having every phase written down.

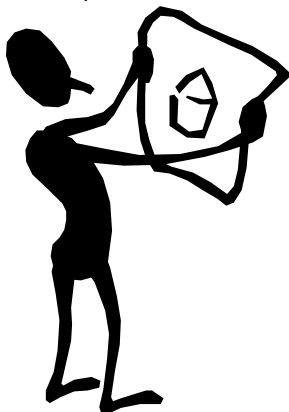
Planning provides a way to track ones progress, prepare for possible setbacks or alternatives, and also provides a means for evaluating and redirecting time, talents and resources in an efficient manner.

Reasons to Plan

1. To reach ones goal or solve a problem with greatest results in the least amount of time.
2. To save time, effort and money.
3. To provide a visual picture of what might be ones mental idea.
4. To provide an organized method for guiding an individual or group action(s).
5. To cause action to occur.
6. To provide organization and structure to the future so past events do not reoccur.
7. To identify and fully use resources.
8. To formalize plans in writing so there is accountability for deadlines.
9. To involve all parties who will be responsible for planning, conducting and evaluating the final project.
10. To provide a means to best use the time, talents, skills and resources of others.
11. To assign responsibilities.

Steps in Planning

Planning requires making decisions and writing the decisions down. The following steps will guide one in learning how to plan and follow through with the plans.



1. **Set a broad goal or objective.** – A goal is a simple statement of what one wants to do or learn. This statement defines a task which may be for self improvement, personal gratification or for the good or growth of a group or organization. Skinner states, “A goal must be written; otherwise, it is only a wish.” He goes on to say, “A goal is a projected accomplishment; an objective; an end; the purpose towards which an endeavor is directed.”

Goals can be long-term and short-term. A long-term goal is the main objective or purpose that one is focused. Short-term goals are the many smaller steps necessary to breakdown the long-term goal. Goals must be attainable. It must be something the person or people can actually do with the time and resources available. Goals only become reality when the person making or setting the goal takes action. Before setting goals make a list of the things you know. Then set your long-term goals based on what you want to learn or do. The short-term goals will be the steps needed to achieve the long-term goal. An example of short-term goals in 4-H project work might include:

- 1 project a month
- 1 public speaking opportunity at local 4-H meeting
- Exhibit in 2 county competitive events
- Participate in 1 county activity

In the book 22 Leadership Principles Skinner states, "A goal must have a purpose: to construct an item, to make money, to beautify or preserve something, to benefit an individual, to benefit a group, for personal satisfaction or pleasure, etc. The purpose needs to be clear to the individual or group members who will perform the task or project." He goes on to say, "that a person or group can not accomplish a goal that is not defined or cannot be visualized."

To learn more about setting goals refer to *4-H Volunteer Development Series Lit. 857, Goal Setting*.

2. **Decide what form the project will take.** – Details are defined in this step of the planning process. Ask yourself the following questions. What exactly has to be done? When does it have to be done? Where is it to be done? Who does what? How is it to be done? Answer these questions as the decision is made, and write it down.

3. **Get everyone affected involved.** – People involved in the plan must be involved in the planning process so they understand what you are doing and they are committed to helping. Most people have a sense of ownership and are more supportive of plans when they are involved in the process. People at all levels – 4-H members, parents, volunteers, Extension Educators, etc. – must be included in the planning process.

Planning should be a cooperative effort with each level being involved. A good leader places people in roles which best use the individual's talents, experience(s) and skills. The process of delegation assures that people are placed in a situation, in which they are capable of handling while at the same time providing an opportunity for personal growth and challenge.

4. **Consider the resources available.** – Skinner includes the following resources for consideration and inclusion at each level of planning:

- a. What talents, skills and ideas will be needed? Are these available within the planning level of the individual or organization or must they be secured from outside?
- b. What leadership will be required for success? Is leadership available for this project?
- c. What facilities, equipment, materials and supplies will be needed?
- d. How much time and support is available?
- e. How will the project be financed? Where will the money come from to complete it?
- f. Is publicity important to the success of the project? What types of publicity will be needed?

5. **Develop a step-by-step course of action to completion.** – This step involves writing a step-by-step plan from start to finish for the goal stated. Each individual or group with responsibility in the process needs to write and submit their plans for completing their assigned responsibilities within the master plan.

Two things must be included in all plans: 1) a written timeline for completing each step, and 2) a list of specific, detailed resources required for each step of the plan.

Avoid generalities. Be specific. And most importantly, be committed to each step in the process.

6. **Develop a sound organization.** – Step 6 is done in conjunction with Step 5. As each step in the action plan is developed it must include detailed responsibilities. In Skinner's book he says, people must know what is expected of them, when they are to perform, and who has the talents or skills, as well as, resources needed to do the job.

Instructions need to be clear and specific. The chairperson or project leader has the ultimate responsibility for the project, but through sound planning and delegation, the action plan can be completed without the chairperson doing everything.

7. **Consider alternatives.** – Be sure to identify and write down alternative plans just in case things change or don't work out as expected or planned. Plans should be flexible enough that alternatives for each of the following may be considered:

- a. The form the project will take.
- b. The steps of the master plan.
- c. The project organization.

8. **Put the plan into effect.** – Take action and complete the steps in the action plan. Keep to the established timeline.

9. **Test the plan at each stage of completion.** – Experience in developing plans, how carefully the plan is thought out and how effectively written each step of the plan is; all combine to determine the ease with which the plan is carried out. If things do not work out as planned or a better way is found to accomplish the goal there should be flexibility to make the changes.

During Step 9 ask the following questions: Was the plan workable? Was the plan complete? Do alternatives have to be used in the plan? Are other resources needed? Have a lot of corrections had to be made? Use the answers to make alteration and correction in Step 10.

10. **Follow-through to completion, readjusting plans as necessary.** – Steps 9 and 10 work together. As it becomes obvious that the original plan is incomplete or unworkable be flexible and make the necessary decisions to substitute the identified alternatives which will make the plan practical and workable.

11. **Evaluation.** - To finalize the planning process a 4-H member or volunteer needs to have some form of evaluation whether it be formal, informal or both. Formal evaluation would come from a competitive event, a project leader, club leader, record book judging, etc. Informal evaluation would consist of self-evaluation. The individual would look at their goals, what they accomplished, what was learned and then reset their goals for the future. The goal-setting process should be a continuous process throughout the 4-H career. It is establishing a learned behavior pattern which in turn becomes a life skill.



Don't Resist Planning

People who resist planning because they believe it takes time, involves too much thought and paperwork, is to restrictive to their creativity or it makes them too accountable, waste more time and energy simply because of their lack of planning. In the end planning saves time, energy and resources.

Put it in Writing

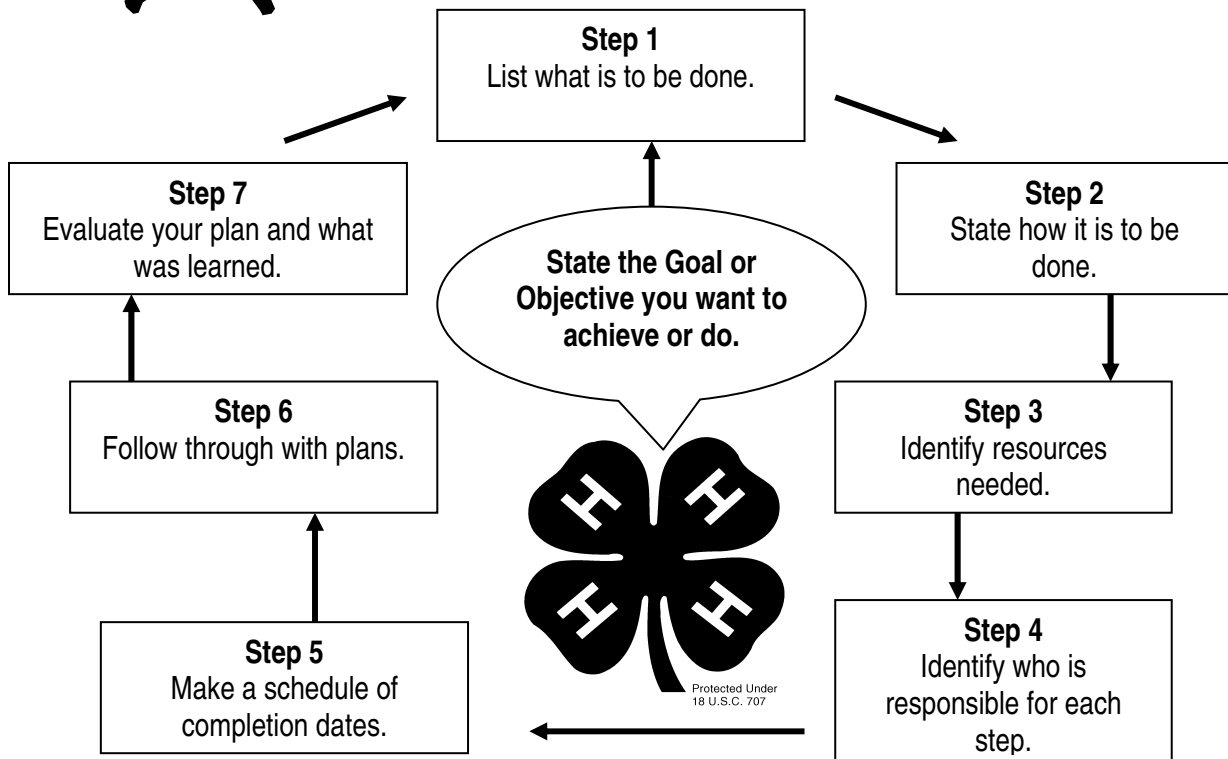
When a plan is put in writing three things happen:

- The plan becomes clearer.
- The plan is easier to communicate to others.
- The plan is more permanent.

Planning is the Key to a Successful 4-H Experience

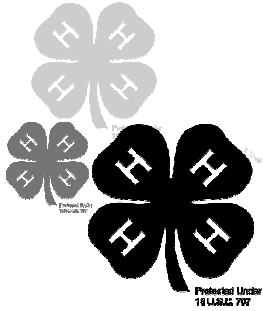
A complete set of 4-H Plans will include the following:

- List what is to be done.
- How it is to be done.
- Identifies resources needed.
- Identifies who is responsible.
- Provides a schedule of completion times.
- Follow-through with the plans.
- Opportunity for evaluation.



Planning Process for 4-H Project Work

Resource: 22 Leadership Principles, by Rulon D. Skinner, 1992, Horizon Publishers & Distributors Inc.



Review Questions Unit 2C

Name _____ County _____

Address _____ Zip _____

Club _____ Phone _____

E-mail Address _____ Date Completed _____

A minimum of three (3) 4-H Parent-Volunteer Self Study Lessons may be completed as one of the four necessary trainings required to maintain active status as a Certified 4-H Volunteer. The completed review questions from each lesson must be filed annually by the date specified by your county office.

What is planning?

Name six of the eleven reasons to plan that would be most helpful to you.

1. _____ 4. _____

2. _____ 5. _____

3. _____ 6. _____

Which of the eleven steps in the planning process were you least aware of and how will you use it to help you be a better planner.

What three things happen when you put a plan in writing?

- a. _____
- b. _____
- c. _____

A complete set of 4-H Plans will include seven steps. List the seven steps below.

- Step 1 _____
- Step 2 _____
- Step 3 _____
- Step 4 _____
- Step 5 _____
- Step 6 _____
- Step 7 _____

Extension Office Use Only Date Received by Extension Office _____ Reviewed by _____
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