

Gateway to the World: A Toolkit and Curriculum

MODULE 1: STRATEGIC GOAL PLANNING AND PRIORITIZING



Developed and compiled through a partnership between:



Washington's
Mental Health Transformation Project
Partnerships for Recovery & Resiliency

and



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Strategic Goal Planning
SKILL ASSESSMENT

The following questions will help you identify areas of strategic goal setting in which you may want further information. Those with which you excel and target those which you need to develop. By yourself or with your team try to answer each of the questions as honestly as possible. After completing this assessment, review it with your team and identify those skills you would like to strengthen.

| | I do not know how to do this | I need to know more about this | I can do/have done this |
|---|------------------------------|--------------------------------|--------------------------|
| 1. Know how to set goals | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Understand how to prioritize and utilize time management strategies | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Know how to write goals in a way that feels helpful to me | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Know the difference between goals and objectives and how to use objectives to meet goals. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Know how to deal with difficult situations when they arise and know how to problem solve them. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Understand how to communicate cooperatively. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Understand goals related to my employment and future career. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Understand goals related to my illness management and recovery | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Understand goals related to household management. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Section 1

Setting Objectives

Nothing happens until we plan. Good plans have goals and objectives. Setting goals and objectives correctly provides the necessary support and aids in their achievement. Before we dive into how to go about setting objectives, it's important to understand that there is a world of difference between *goals* and *objectives*.

Goals relate to our aspirations, purpose and vision. For example, I have a goal of becoming financially independent.

Objectives are the battle plan, the stepping stones on the path towards the achievement of my goal.

A goal may have one or many objectives that would need to be fulfilled to achieve the goal. For example, to become financially independent I may need to 1) get out of debt, 2) improve my saving and 3) start a business.

The most well known method for setting objectives is the **S.M.A.R.T.** way, the SMART approach is well understood amongst individuals, but can be poorly practiced. S.M.A.R.T refers to the acronym that describes the key characteristics of meaningful objectives, which are **Specific** (concrete, detailed, well defined), **Measureable** (numbers, quantity, comparison), **Achievable** (feasible, actionable), **Realistic** (considering resources) and **Time-Bound** (a defined time line). Let's look at these characteristics in more detail.

SMART objectives are the stepping stones towards the achievement of our goals.....

Specific

Specific means that the objective is concrete, detailed, focused and well defined. That is the objective is straightforward, emphasizes action and the required outcome. Objectives need to communicate what you would like to see happen. To help set specific objectives it helps to ask the following questions:

- **WHAT** am I going to do? These are best written using strong, action verbs such as conduct, develop, build, plan, execute, etc. This helps your objective to be action-oriented and focuses on what's most important.
- **WHY** is this important for me to do?
- **WHO** is going to do what? Who else needs to be involved?
- **WHEN** do I want this to be completed?
- **HOW** am I going to do this?

Questions to ask yourself

- What exactly are we going to do, with or for whom?
- What strategies will be used?
- Is the objective well understood?
- Is it clear who is involved?
- Is it clear where this will happen?
- Is it clear what needs to happen?
- Is the outcome clear?
- Will this objective lead to the desired results?
- objective described with action verbs?

Achievable

Objectives need to be achievable, if the objective is too far in the future, you'll find it difficult to keep motivated and to strive towards it's attainment. Objectives, unlike your aspirations and visions, need to be achievable to keep you motivated. Whilst being obtainable, objectives still need to stretch you, but not so far that you become frustrated and lose motivation.

Questions to ask yourself

- Can we get it done in the proposed timeframe?
- Do I understand the limitations and constraints?
- Can we do this with the resources we have?
- Has anyone else done this successfully?
- Is this possible?

Realistic

Objectives that are achievable, may not be realistic..... however, realistic does not mean easy. Realistic means that you have the resources to get it done. The achievement of an objective requires resources, such as, skills, money, equipment, etc. to support the tasks required to achieve the objective. Most objectives are achievable but, may require a change in your priorities to make them happen.

Questions to ask yourself

- Do you have the resources available to achieve this objective?
- Do I need to revisit priorities in my life to make this happen?
- Is it possible to achieve this objective?

Measurable

If the objective is measurable, it means that the measurement source is identified and we are able to track the results of our actions, as we progress towards achieving the objective. Measurement is the standard used for comparison. For example, what financial independence means to me, may be totally different compared to what it means for you. As is so often quoted, **if you can't measure it, you can't manage it!** Importantly, measurement helps us to know when we have achieved our objective.

Questions to ask yourself

- How will I know that the change has occurred?
- Can these measurements be obtained?

Time-Bound

Time-bound means setting deadlines for the achievement of the objective. Deadlines create the all important sense of urgency. If you don't set a deadline, you will reduce the motivation and urgency required to execute the tasks. Deadlines create the necessary urgency and prompt action.

Questions to ask yourself

- When will this objective be accomplished?
- Is there a stated deadline?

Section 2

Why Writing Your Goals Is So Important.

Writing down your Dreams and Goals is an important first step towards achieving them. First, because by writing them down it forces you visualize your Goals. And second, because the act of writing them down creates a commitment on your part. Only about 5% of the population actually takes the time to write down their Goals and Dreams. Maybe that is why so few people actually are living the life that they would like to be living.

Writing down your goals creates the roadmap to your success. Although just the act of writing them down can set the process in motion, it is also extremely important to review your goals frequently. Remember, the more focused you are on your goals the more likely you are to accomplish them.

Here are the four rules of writing goals down:

1. Write your goal in the positive.

Work for what you want, not for what you want to leave behind. Part of the reason why we write down and examine our goals is to create a set of instructions for our subconscious mind to carry out. Your subconscious mind is a very efficient tool, it can not determine right from wrong and it does not judge. It's only function is to carry out its instructions. The more positive instructions you give it, the more positive results you will get.

Thinking positively in everyday life will also help in your growth as a human being. Don't limit it to goal setting.

2. Write your goals out in complete detail.

Instead of writing "A new home," write "A 4,000 square foot contemporary with 4 bedrooms and 3 baths and a view of the mountain on 20 acres of land".

Once again we are giving the subconscious mind a detailed set of instructions to work on. The more information you give it, the more clear the final outcome becomes. The more precise the outcome, the more efficient the subconscious mind can become.

Can you close your eyes and visualize the home I described above? Walk around the house. Stand on the porch off the master bedroom and see the fog lifting off the mountain. Look down at the garden full of tomatoes, green beans and cucumbers. And off to the right is the other garden full of mums, carnations and roses. Can you see it? So can your subconscious mind.

3. Write in present tense.

Write your goals down in the present tense. This is because the unconscious mind chooses a path of least resistance. If you write, "I will be slim" the unconscious mind does nothing thinking that the will be may be postponed until later.

A friend had a business, which was losing money. He set his goal to break even the next month. Every month the next month would come and be this month so his goal would be true to break even the next month, which would never come. Eventually he changed his goal to, "I am breaking even this month." That very month he broke even for the first time.

Write them in present tense, first person, as if they are currently true.

4. Re-write your goals.

When the words are written and then repeatedly re-written they have maximum impact.

So don't be content with a first draft.

Write down your goal. Then rephrase it, compact it, add motivating adjectives, make it pithy. A week later you may want to adjust it again. Keep on fine-tuning.

Writing your goals down is the first step to make the goals more real. Somehow having things in writing really makes them seem more important to most people. It will also make it easier to make the plans needed to reach your goals if you have something in writing.

Putting it in writing breathes life into it making it a force which cannot be easily stopped.

In many situations people use words goals and objectives as interchangeable. Yet, in the context of goal setting, the difference between goals and objectives has an important practical meaning.

After you set your important goals you move to setting objectives. Objectives are also goals, but they are down the hierarchy. They are sub goals set with the only purpose to serve your goals.

To achieve your goals, which conditions should you provide, which resources should you collect, which skills should you develop, what knowledge should you acquire? Is there anything significant you should achieve before you can reach your goals? Formulate the answers to these questions as your objectives, in writing.

Note that objectives are also more than just activities. They still contain some challenge in them. Activities are things that you just do.

So, while a particular goal is important to you on its own, objectives and activities are important too, but not on their own. If an objective or activity does not work to help achieving your goals, change or replace that objective so that it does.

To achieve success, you need both persistence and flexibility. When you face difficulties and unexpected problems, use all your persistence and determination to stick to your goals. But always stay flexible with your objectives and activities. If the way you do things now does not work, try another way. Keep trying until you find the one that works.

Don't change the ends, change the means. And never forget the difference between ends and means, between goals and objectives.

Section 3

How to prioritize tasks

Task prioritization and effectively managing to-do lists are essentially skills for success.

Time is the most precious commodity in our lives. We need to learn to manage our time effectively through prioritizing the things we need to accomplish on a daily basis.

There never seems to be enough hours in the day to complete the tasks and projects we want to complete. But managing your time means working smarter – not longer. In other words, you need to learn how to prioritize.

For many people, learning how to establish and maintain priorities is the single most effective way to increase their performance in the workplace and to accomplish goals. Although it sounds simple, there is more involved with prioritization than deciding what to do next. Successful prioritization requires the execution of a carefully designed plan. Here is a step-by-step approach to help you get started . . .

Step 1: Make a List

The first step in prioritizing your tasks is to make a to-do list. This list will be your primary touch point for completing tasks and assignments in the workplace. Many people find it helpful to start by writing down all of their pending projects in no particular order. For now, the important thing is to just get them on paper and to consolidate all of your little lists into a single, comprehensive to-do list. Multiple lists are not an option!

Step 2: Establish Due Dates

Beside each item on the list, write down its actual due date. Don't establish due dates based on when you would like to have them completed. Instead, write down the date when the task is actually required to be completed. If you are unsure when a particular task is due, do a little research before you rank them in order of importance.

Step 3: Assess Interdependent Tasks

Once you have ranked your tasks by due date, the next step is to decide which – if any – of the tasks on your to-do list significantly impact other people's to-do lists. For example, if someone else is waiting for you to complete your task before they can complete theirs, you may want to consider moving it up on the list, even if it's official due date is further out.

Step 4: Consider Consequences

Not all tasks are created equal. You may find you have tasks due immediately that have minimal consequences should you decide to put them off for a few extra days. On the other hand, you may also have tasks with extremely significant consequences that aren't due until next week. In that case, the smart move might be to put off the tasks with limited consequences so you can get started on the highly important tasks right away.

Step 5: De-Clutter the List

Most to-do lists are cluttered with relatively small tasks that require little time, but collectively feel like a ton of bricks hanging over your head. Every now and then, it is useful to take a half-day to de-clutter the list. By checking off a large number of little things on the list, your time will be freed up to concentrate on the things that are most important.

Step 6: Reassess

Priorities change constantly. As a result, you need to constantly reassess your to-do list to keep up with your changing priorities. Once a day is probably too often, but a weekly reassessment of your priorities is not unreasonable.

Prioritizing Activity

Instructions

Supplies You May Need For The Activity:

Pen Or Pencils

Personal Organizers

Spiral Notebooks

Post-it Notes

Calendars

1. Step 1

Break down your list according to time limits. Decide which of the items on your list must be done today, this week, this month or even this year. Those with the shortest time limits will obviously hover at the top of your list.

2. Step 2

Consider how the priorities on your to-do list will affect the lists of others. It might be prudent to give some of these to a top priority if others are waiting for you to complete something before they can do their part.

3. Step 3

Look at consequences that will occur if you don't accomplish something on your list. Do this with every item on your list and determine which items warrant top priority by deciding which consequences you can or cannot live with.

4. Step 4

Take into account the positive things that could happen if you accomplish certain things on your list. If completing a project will increase the likelihood you will get into college, or putting together a presentation for your boss will get you a raise, then by all means give those items a place of honor on your list.

5. Step 5

Weed out projects or events that always sink to the bottom of your list. This will increase the amount of time you can spend on more important things.

Section 4

Decision making is an important skill to learn because we make decisions every day, big and little. We all want to be independent, responsible, happy adults. Learning and using a decision-making and problem-solving process will help them grow toward this goal.

We all want to make the most out of the decision affecting us. We will learn and grow from our successes and our mistakes. We need to make decisions for ourselves and make long term goals and plans if we are to make the most out of our lives. As young adults we need to be ready to take on this task now.

There are several steps to decision making/problem solving. Walking through the steps helps us to learn them better and to feel more enabled and control of our lives. Open communication with others who have gone through positive decision making processes can also be helpful when setting goals and making decisions. Others may be able to role model how they have gone through this process in their lives.

Six Steps to Decision Making/Problem Solving

1. Identify and Define the Problem.
2. List Possible Options/Alternatives.

Use a brainstorming technique where you put a lot of ideas on paper. It is important to come up with the first idea and put it down even if it doesn't seem workable to you. If you can't seem to get started (take time to think first), ask for suggestions. It is okay at first if your ideas are silly or outlandish. Be free with your ideas. Keep going until you can't think of any more ideas/options. Remember not to be judgmental. This is just a gathering of ideas.

3. Evaluate the Options.

Evaluate the options, you can do this with your team or someone you trust. They can provide guidance, support, and encouragement. Ask for points you may not have thought of.

Evaluate your options by asking questions such as these: Is it unkind? Is it hurtful? Is it unfair? Is it dishonest?

4. Choose One Option.

It is important that the solution to the problem does not create a problem for someone else.

5. Make a Plan and Do It.

This is probably the most difficult step. If your choice is not acceptable to the other person, you may need to go back to the list of options.

6. Evaluate the Problem and Solution.

This is probably the most neglected step in decision making but it is critical to the learning process. Look at: What brought the problem about? Can a similar problem be prevented in the future? How was the present problem solved? You can feel good about your success - or learn and take ownership of looking for another solution.

Cooperative Problem Solving

Cooperative problem solving is a way to deal with disagreements between individuals, such as parent and young adult, or peer to peer disagreements. It builds on the six-step decision making model.

1. Present the problem.
2. Look for agreements that lead to solutions.

At every point, look for agreement. Watch out for when it changes from "let's work this out" to "lets fight."

3. Gather information on the perceptions of everyone concerned. It is important sometimes to wait until both parties are calm before going to far into this step.
4. Stick to the issue and listen.

Instead of replying with a sarcastic comment like "It never seems to be a good time," try reflecting feelings: "So you were busy at the time?" When others start sharing their feelings, you need to listen carefully for the feelings underneath the words. They may not be used to sharing feelings and may be wary that a lecture or an argument is coming. He or she might reply, "Yes, I hate it when you say 'Do it now.'" You might reply: "Oh, I didn't know you felt that way. Do you have any other feelings about it?"

5. Keep asking: "Is there anything else?"

It is important to keep asking this question until it all comes out. Otherwise you'll probably be dealing with surface issues rather than deeper issues. Use responses that reflect what they have just said to see if you are understanding: "So that's your least favorite thing to do?" Then ask: "Is there anything else?"

6. Reflect your understanding.

See if you can summarize and say back to the other person in a calm, neutral voice what he/she just said to you. If your they say that isn't what he/she meant, ask him/her to clarify. By this point you should be aware of how the other person is feeling about the issue and probably others.

7. Share your perceptions.

One way to guarantee a nonreceptive receptive response is to share your perceptions before asking if they are willing to listen. There is something magical about getting their permission first that invites listening and cooperation. After they have agreed to listen, share your perceptions of the problem. Remain calm and do not put them down. Just share your feelings.

8. Ask the other person to reflect their understanding.

Reply: "Can you tell me what you just heard me say?" Let them respond. It is helpful to respond that you weren't criticizing them, but just sharing your feelings. Also state that you realize that it may be different for them and that's okay.

9. Brainstorm for solutions.

Now you both have shared thoughts and feelings and had them respected by the other (validated). It's time to ask the question, "Could we see if we can come up with some ideas we can both live with?" Then brainstorm ideas.

- Agree on a Solution.
- Set a Date for Evaluation.
- Follow Through.

By being respectful others learn respect. By following through on our commitments and being responsible, they learn responsibility. We teach through example. The old saying "Do as I say, not as I do" doesn't cut it nor does it bring the desired outcome.

Section 5

IMR Goal Tracking Sheet (Review at least monthly)

Name: _____ Date that Long-term Goal was Set: _____

Long-term (Meaningful) Goal: _____

Achieved (date): _____ **Modified* (date):** _____

*** Start a new Goal Tracking Sheet if the Long-term Goal is modified or a new goal is set**

Short-term Goals (place a \checkmark after steps achieved):

1. _____

2. _____

3. _____

Steps:

- 1.
- 2.
- 3.
- 4.

Steps:

- 1.
- 2.
- 3.
- 4.

Steps:

- 1.
- 2.
- 3.
- 4.

Start date: _____

Start date: _____

Start date: _____

Date Reviewed: _____

Date Reviewed _____

Date reviewed _____

Achieved: Fully
Partially
Not at all

Achieved: Fully
Partially
Not at all

Achieved: Fully
Partially
Not at all

Modified/Next Steps:

- 1.
- 2.
- 3.

Modified/Next Steps:

- 1.
- 2.
- 3.

Modified/Next Steps:

- 1.
- 2.
- 3.

4.

Date Reviewed: _____

Achieved: Fully
Partially
Not at all

Modified/Next Steps:

- 1.
- 2.
- 3.
- 4.

Date Reviewed: _____

Achieved: Fully
Partially
Not at all

Modified/Next Steps:

- 1.
- 2.
- 3.
- 4.

Date Reviewed: _____

4.

Date Reviewed_____

Achieved: Fully
Partially
Not at all

Modified/Next Steps:

- 1.
- 2.
- 3.
- 4.

Date Reviewed_____

Achieved: Fully
Partially
Not at all

Modified/Next Steps:

- 1.
- 2.
- 3.
- 4.

Date Reviewed_____

4.

Date reviewed_____

Achieved: Fully
Partially
Not at all

Modified/Next Steps:

- 1.
- 2.
- 3.
- 4.

Date reviewed_____

Achieved: Fully
Partially
Not at all

Modified/Next Steps:

- 1.
- 2.
- 3.
- 4.

Date reviewed_____

Achieved: Fully
Partially
Not at all

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Modified/Next Steps:

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- 2.
- 3.
- 4.

Modified/Next Steps:

- 1.
- 2.
- 3.
- 4.

Date Reviewed: _____

Date Reviewed_____

Date reviewed_____

Achieved: Fully
Partially
Not at all

Achieved: Fully
Partially
Not at all

Achieved: Fully
Partially
Not at all

Modified/Next Steps:

- 1.
- 2.
- 3.
- 4.

Modified/Next Steps:

- 1.
- 2.
- 3.
- 4.

Modified/Next Steps:

- 1.
- 2.
- 3.
- 4.

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