

LIFE PLANNING AND GOAL SETTING

STEP 1: Brainstorming

Pull out the worksheets for each of the six categories: Career, Education, Leisure, Material/Financial, Personal Growth, and Relationships. On each worksheet list as many goals as you can think of that you would like to accomplish in that category. Working quickly, go for quantity and don't censor any impulses. Don't limit yourself in any way – if it comes to mind it's a potential goal – no matter how big, small, or impossible it may seem. It's okay if a goal shows up on more than one list. If you need a jumpstart, refer to the sample sheet of some goals others who have completed this exercise have listed. Goals should reflect your values, priorities, and sense of mission in life.

STEP 2: Prioritizing

Look back over each worksheet and mark the three most important goals in each category. This will give you 18 goals. Transfer these goals to 18 index cards. If you would like, you can use different color index cards for each category. Sort your cards in order of importance. One way to do this is to pick any two cards at random and put the most important of those two on top. Then pick up one more card and compare it to the top card. If it's more important it now becomes the top card. If not, compare it to the second card, and place it accordingly. Then pick another card and compare it to each card from the top down until you find where it goes. Another way to sort your cards is to lay them all out in front of you and then pick out the most important one, then the second most important, etc. until all cards are in order.

STEP 3: Clarifying

Take your top three goals and on the index card or a separate piece of paper refine, shape, and polish each goal. Make each goal as specific and measurable as possible. For example: change "I want to be financially independent" to "I want to accumulate net assets of one million dollars by age 50". If you have a goal like "find a better job" make it more specific by asking clarifying questions such as: what kind of job? Making how much money? In what field? Requiring what skills? Working in what type of environment? By when? Try to specify as clearly as you can what it is that you want.

Some goals are not easy to measure such as "being a good citizen" or "being happy" because they are too broad and hard to quantify. Try to break them down into more specific parts – what does being a good citizen mean to you? How will you know if you are? What does happiness mean to you? What would be happening in your life, what would it look like?

STEP 4: Final Analysis

Make sure your major goals are compatible. If attaining one goal prevents you from attaining one of the others, then you will have a problem. So do a double check to see that your goals don't conflict. If they do, you may need to choose between them or choose to accomplish them at different times in your life. Be sure your goals are attainable and also challenging enough. Setting an impossible goal will only frustrate you and waste your time. Keep your goals visible. Post them some place you will see them each day. Write them in your journal and refer to them often. Incorporate them into your daily planner. Make a collage and put it on the inside of your closet door where you'll see it each morning when getting dressed.

Career Goals

Goals related to professions, occupations, or other vocational activities you wish to pursue in life.

Educational & Life-Long Learning Goals

Goals related to formal education (such as earning a degree), informal learning on your own, community education classes and workshops, learning in order to participate in new hobbies, sports, or other leisure pursuits, learning a new language, enhancing job skills, learning a subject for the fun of it, reading, and other life-long learning activities.

Leisure Goals

Goals related to how you spend your free time – leisure activities, hobbies, crafts, recreation, sports, travel, movies, theater, community service involvement, cultural activities, socializing, volunteer work, vacations, clubs, organizations, creative activities, games, etc.

Personal Growth and Health Goals

Goals related to personal health and development (emotional, mental, physical, and spiritual). May include self-awareness and self-discovery activities, following a spiritual path, health & wellness goals, self-improvement, physical fitness, nutrition, mental health counseling, creating your philosophy of life, goal setting, overcoming an addiction, stopping a bad habit, meditation practice, etc.

Relationship and Community Goals

Goals related to all the different relationships in one's life. This includes family members, spouse, partner, romantic relationships, dating, children, friendships, co-workers, colleagues, community members, neighbors, organization or club members, etc. Also includes civic engagement, volunteerism, community involvement, charity, etc.

Material and Financial Goals

Goals related to acquiring material goods and/or major purchases (house, car, clothing, sports equipment, hang glider, computer, sewing machine, piano, ATV) savings, retirement planning, financial planning, charitable contributions, vacation money, etc.

Sample Goals

Career

Figure out my career direction
Find a college major with a good fit
Be a teacher
Find a career where I can make a difference
Write a novel
Publish a magazine
Play guitar in a band
Be a homemaker
Get promoted
Be a senator
Find a better job
Develop my new project idea at work
Take over my parents' farm
Join the Peace Corps
Meet with a career counselor
Work in Europe
Own a resort in the Caribbean
Start my own business
Earn a living working freelance jobs

Educational & Life-Long Learning

Get my high school diploma
Learn to play guitar
Figure out what to major in
Earn a college degree
Earn a master's degree
Earn a PhD
Learn Spanish
Take parenting classes
Read all works by Shakespeare
Learn to play the piano
Learn car maintenance
Learn web page development
Take community ed. classes
Learn how to make stained glass art
Learn how to invest my money
Learn how to sail
Learn ballroom dancing

Leisure

Learn how to use Second Life
Try skydiving
Try out for a part in local theater
Travel to Italy
Volunteer monthly at the food shelf
Plant a garden
Save for a new computer
Join a book club
Do a canoe trip in the Boundary Waters
Join a bowling league
Have family night once a week
Play in a band
Spend time in nature every week
Research family history/genealogy
Visit every state in the US
Climb Mount Everest
Go rock climbing up the north shore
Watch all movies on the AFI top 100 list

Relationship and Community

Find my soul mate
Get married
Stay single
Raise children
Stay child free
Start a neighborhood watch program
Spend more time with my Dad
Move closer to family
Move far away from family
Take a parenting class
Take a child development class
Keep in touch with friends
Become a better listener
Vote in every presidential election
Get out of an unhealthy relationship
Organize a big family reunion
Get to know all my neighbors

Material & Financial

Pay off credit cards
Buy a new computer
Save for down payment on house
Have 3 months salary in savings
Get credit counseling
Give 10% of earnings to charity
Buy a piano
Own a cabin on a lake
Start a vacation fund
Be a millionaire by age 50
Own a big boat
Collect fine wine
Save for engagement ring
Save for Wedding and Honeymoon
Live off the grid (generate own electricity)
Re-finance my mortgage
Pay off college loans ahead of schedule
Learn to budget
Learn about investing money

Personal Growth & Health

Write regularly in my journal
Improve time management system
Learn stress management
Become vegetarian
Write out my philosophy of life
Read self-improvement books
Get to know myself better
Clarify my spiritual beliefs
Search for a religion that fits
Become more involved in my church
Sleep at least 8 hours a night
Set up a regular exercise plan
Maintain a healthy weight
Seek counseling
Have more wiggle room in my schedule
Get a medical check up
Do life planning & goal setting exercise yearly
Start a meditation practice
Learn a better way to manage my time

Goal Setting and Life Planning – Follow up

Now that you have gone through this exercise, here are some good things to do as a follow up to help you reach your goals.

1. Evaluate Your Goals

a) Are They Yours?

Make sure they are YOUR goals. Don't let anyone else set your important goals for you – it's your life. Too often people adopt goals that imposed upon them by parents, partners, significant others, friends, religious institutions, employers, teachers, and/or the current culture and they are never questioned. These can be powerful forces trying to influence you – and they often would rather you pursue their goals and not your own. And sooner or later if you are living someone else's dream, you will not stick to it or have a fulfilling life – your goals will just feel like obligations. The key is make sure your chosen goals are in line with your true beliefs, values, mission, and sense of purpose in life. Be true to yourself and what your inner guidance system tells you. Your goals will then be exciting to you and provide you with unlimited motivation.

b) Do They Measure Up?

Write your main three big goals in a specific, measurable form. Maybe you have a lofty goal like “be wealthy”, but it doesn't give you a specific target to shoot for. And in order to reach your goals, that's important. So you have to ask yourself, “what is my definition of being wealthy? What does this mean to me? What is my deadline for achieving this?” Once you've answered those questions you could then re-write the goal to say, “I will have 1 million dollars in the bank by the age of 35.”

c) Are They Achievable?

Good goals are those that are neither too challenging nor too easy. If you've made a goal too lofty, bring it down to earth, or break it up into smaller more achievable goals. On the other hand, if your goals are too easy they won't provide you with a sense of satisfaction when you achieve them. And you may decide, “why bother” because you may not value them much. Good goals cause you to stretch and grow in order to achieve them.

d) Are They Exciting?

Are the top goals on your list ones that you are truly tuned into? Are they goals you will enjoy achieving? Both the journey and the destination? One quick test is: your main goals should be your reason for getting up in the morning – they make your life worthwhile.

e) Are Your Major Goals Compatible?

Take a look at your current top 3 goals. Are they compatible? If not, it doesn't mean that you have to give something up. It may just mean that you can't work on them consecutively – you may have to sequence them out. You can have anything you want for goals, but you may not be able to have them all at the same time.

f) Are Your Goals Flexible?

Keep your goals open to revision and change. Review and update them on a regular basis. As a person grows and changes over time, so too will their goals.

2. Keep Your Goals Visible

Find a creative way of posting these goals where you can see them everyday.

One way might be to use colored construction paper and markers and cut out shapes, and write your goals on them.

Or cut pictures from magazines to represent your goals and make a collage. Then tape them to the inside of your closet door or put them on the ceiling over your bed.

Write your goals in the front of your planning calendar or journal and read them over every day.

Post your goals on your blog or a social networking site.

Post your goals on an interactive “life goals” website like:

- SuperViva
- 43 Things
- Reaper List
- Bucket Lists Wiki at Wet Paint
- My 50
- Your 100 Things

You'll know you have the right goals for you when you get up in the morning feeling motivated and excited about pursuing them!