

# Module Four: Developing Your Regional Vision and Regional Goals

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Module Four will focus on creating a regional vision and key goals.

## Using the Workbook

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The participant workbook contains worksheets designed to assist participants in planning their economic development effort.

## Group Exercises

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There are a number of group exercises in this Session. Do each exercise – they not only help the participants understand the materials, they also provide a break from listening to presenter and allow the participants to get to know each other a little.

A summary of the group discussions and exercises:

Slide #1: Group introductions; use ice-breaker if desired

Slide #8 & 9: Evaluating the Vision Statement of a Regional Organization

Slide #11: Steps in Building a Vision Statement

Slide #17-19: Goal Statement Evaluation

**Slide: 1**

**Time: 15+ Minutes**

Have this slide showing as people enter the meeting room



***Instructions:***

Show this slide and indicate to the participants that Module Four will focus on creating a regional vision and key goals.

***Script:***

“Our session today is on the subject of regional vision and goals.

It’s pretty natural for groups to say something along these lines: ‘Why do we need to fuss with developing a regional vision? And what’s the big deal about defining regional goals?’ All I can say is that both are your team’s calling card – it communicates what your team is focused on achieving in the region.”

[Move to the next slide at this point.]

**Slide: 2**

**Time: 3 Minutes**

**Activity: Discussion**



**Something to Think About**

Vision without action is a daydream.

Action without vision is a nightmare.

*Japanese Proverb*

**Instructions:**

Read each of the statements on this slide – one at a time. Then ask the participants to share their reactions to the two statements. Can they identify with either (or both) of these statements? Call on a small number of people to share their thoughts on the slide.

**Script:**

“I’d like to share with you a Japanese proverb that really hits at the heart of why having a vision is so crucial to the work of your regional team. Here is what the first portion of the proverb states:

‘Vision without action is a daydream’

I’m sure you’ve worked with people, or have served on committees, that have done a superb job coming up with great ideas, but they struggle in getting things off the ground. They may be great thinkers, but they’re not great doers. Having a vision is great, but if you’re paralyzed in your ability to get things off the ground, then there’s little hope you’ll ever achieve your vision; so you are simply daydreaming.

Now, let’s look at the second portion of the Japanese Proverb:

‘Action without vision is a nightmare.’

Wow, another profound statement. Again, many of you have had experiences where you are carrying out activities but you are frustrated because you don’t know where these efforts are going or what they intend to achieve. Without a vision in place, it’s easy for your actions to lead to chaos. When that happens, you have a nightmare on your hands.”

**Slide: 3**

**Time: 2 Minutes**

**Activity:** Instructor reads the bullet points

## Outline of Module Four

- What's This Thing Called "Vision"?
- Features of a Strong Regional Vision Statement
- Developing a Vision Statement for Your Region
  - Building a shared vision: A step-by-step process
- Now . . . Focusing on Regional Goals



***Instructions:***

Briefly share with the participants what Module Four will cover.

***Script:***

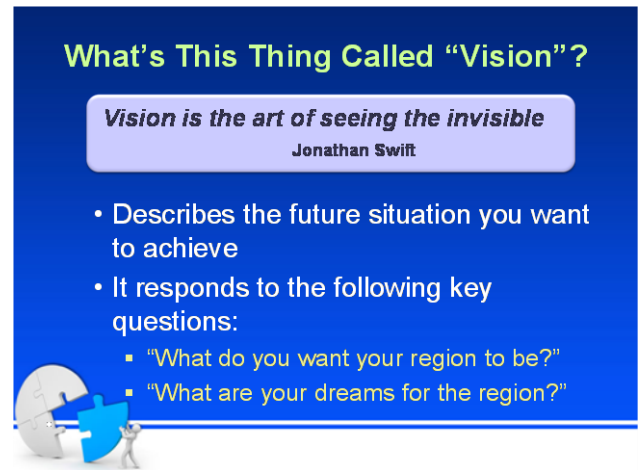
“There are two major topics that we want to focus on in Module Four. The first is your team’s vision. First, do you have a regional vision that is being communicated through a vision statement? Second, do you have regional goals in place? If the answer to both of these questions is ‘no,’ then this module should prove very valuable to you since it will offer guidance on both these topics.

On the other hand, if your team has a vision statement AND/OR goals developed, our module will provide you a chance to assess whether they have the key elements that are crucial to a strong vision statements and viable goals.”

**Slide: 4**

**Time: 3 Minutes**

**Activity: Instructor reads**



**What's This Thing Called "Vision"?**

*Vision is the art of seeing the invisible*  
Jonathan Swift

- Describes the future situation you want to achieve
- It responds to the following key questions:
  - "What do you want your region to be?"
  - "What are your dreams for the region?"

***Instructions:***

Read the statement by Jonathan Swift about what a vision is all about. Then share with your participants the characteristics of a vision.

***Script:***

"So what's this thing we call vision? According to Jonathan Swift, it refers to the art of seeing the invisible.

There are a number of books written over the past several years that have highlighted some of our nation's most effective and successful public, private and not-for-profit sector leaders. One of the key traits that most of these individuals seem to possess is vision – the ability to see things that others oftentimes cannot see. Even in your own experiences, you may find that you are energized when you work with someone or a group that seems to have a vision about the direction of their company, organization, or agency.

Here are some of the important characteristics of a vision.

It focuses on the future – something that we hope to achieve someday in the region;

It expresses the hopes, aspirations and dreams you have for your region;

It delineates what you want your region to be – not so much now, but in years to come"

**Slide: 5**

**Time: 4 Minutes**

**Activity: Discussion**

## The Words of a Famous Coach

All the great leaders have been people of great vision, men and women able to provide insight into what is possible. Vision is your view of the group's future, the place you want to be after the transformation is complete. For the people you are leading, vision is their belief in the overall game plan, their belief that this plan is in their best interest. Without this, all your dreams, all our ideas, can easily be derailed.

Rick Pitino (2000). *Lead to Succeed: 10 Traits of Great Leadership in Business and Life*



### ***Instructions:***

The quote from Rick Pitino, a highly respected and successful college basketball coach, helps to make the case of the importance of a vision and how it can be a rallying point for getting everyone working from the same game plan. Go ahead and read the quote that we present on this slide.

### ***Script:***

“Let me share with you an excerpt from Rick Pitino’s book published in 2000 that shares his views on the important traits of great leaders. He states. . . [Read what’s on the slide at this point.]

What are some of the words that Coach Pitino uses in this paragraph that really strike home for you?”

[At this point, ask for comments from the participants. Try to get 3-4 people to comment and then move on to the next slide].

### ***Additional Comments:***

Some of the words that the group is likely to highlight include the following:

- insight into what is possible
- place you want to be after the transformation
- belief in the overall game plan
- plan is in their best interest
- without this . . . all your dreams. . . can be derailed

## Slide: 6

**Time:** 6 Minutes

**Activity:** Instructor reads



### **Instructions:**

Having discussed what we mean by a vision, the next step is to put that vision into words – words that motivate and provide people, organizations, and communities with an understanding of the team’s hopes and aspirations for the region. This is where a vision statement comes in – it expresses what the team is ultimately shooting for over the long-term.

The slide identifies the various elements that should be incorporated into a strong vision statement. Don’t worry if your participants struggle with this topic because developing a strong regional vision statement is tough work. But, it’s important that one be prepared by the team.

### **Script:**

“Let me state from the outset that preparing a vision statement is not easy. It requires some careful thought and discussion on the part of your team (and others). Fortunately, we do have pointers on the core elements that a vision statement should capture. These are noted in our slide. As you begin to develop a vision statement for your regional team – or you consider ways to refine your existing vision statement – try to make sure that the vision statement:

- (a) Focuses on the future;
- (b) Gives attention to the nature and direction of the change you are envisioning for the region;
- (c) Highlights the purpose of your efforts and includes the values you subscribe to in the region;
- (d) Is written in such a way that it inspires people, groups, and communities that are part of your region;
- (e) Represents something that won’t soon become outdated; it should remain relevant for many years.

It may be challenging to incorporate all of these dimensions in your vision statement, but try to incorporate as many of these components in your vision statement as feasible.”

**Slide: 7**

**Time: 6 Minutes**

**Activity: Instructor reads**



**Instructions:**

Slide seven provides SET participants with a good roadmap on how to develop a vision statement. One of the important points to be conveyed to the group is that a vision statement is not something that should be developed in isolation from the people, groups and communities that are likely to be most impacted by the efforts of the regional team. Thus, it's important for the team to reach out to others in the region because they'll want their vision statement to be one that others (outside of the team) have had a part in creating.

What you want to do is walk the team through the five steps of developing a vision statement. The key steps are noted in the yellow-colored box. The grey boxes located below each major step are intended to provide the team with additional information on how they might want to complete that specific step.

**Script:**

"I'd like to walk you through the step-by-step process for developing a vision statement. Our slide highlights five important steps.

Step 1: The first step seeks to determine the focus of your vision statement. For example:

- Will the focus be on your region, the work of your regional team, or on efforts to build strong and lasting working relationships among local governments in the region?
- Or do you want to focus on the economic development future of the region, or the region's overall quality of life?

It's important to put your arms around what the central focus will be of your vision statement.

Step 2: Seek input from all members of the regional team, from colleagues, from local leaders and groups, and a diversity of residents. Ask them, "What are your future hopes and aspirations for this region with regard to \_\_\_\_\_ (insert here whatever the focus might be of your vision statement)?"

Step 3: Look for common themes and ideas from the inputs you've received. Study these inputs and prioritize the ideas/themes. As a team, decide which ones to retain and which ones to remove from the list if they don't align with the focus your team decided on in Step 1.

Step 4: Take a stab at drafting a vision statement from the core ideas and themes that you've retained. When you feel you have a good draft of your vision statement, share it with others. These could be same groups or individuals you tapped in Step 2.

Step 5: Develop a polished version of your vision statement. Let this be something that your team uses time and time again to inspire others to join or support your efforts in the region."

## Slide: 8

**Time:** 20 Minutes

**Activity:** Small Group Activity

**Workbook:** Worksheet One

**Let's Try it Out**

**VISION STATEMENT:** The Board envisions a healthy regional economy, diversified among a variety of sectors, poised to accommodate economic development of the future, with unprecedented opportunities to the citizens of the Gulf Coast.

Key elements	Your Comments
What's the focus or main theme?	
What are the hopes and aspirations?	
Does it focus on the future ?	
Does it express purpose and values?	
Does it inspire?	
Relevant for many years?	

### **Instructions:**

Slides eight and nine are intended to highlight vision statements of two existing regional organizations (by the way, these are their real vision statements). Ask the group to carefully study both statements and determine the strengths and weaknesses of each. If you want, divide the group into teams of 4-5 individuals and have them work together on this activity.

We urge you to have the participants work through the first vision statement (on this slide) and then ask them to work on the second vision statement found on slide nine. While this may seem repetitive, the group will likely find that the second vision statement gets closer to what we are looking for in a vision statement. Furthermore, dissecting both vision statements will serve as a valuable activity for the team since they're going to be asked to create or fine tune their regional vision statement when they get to Slide 10.

Have the group use the first worksheet contained in the SET workbook to help them evaluate this vision statement.

### **Script:**

"I want to share with you a vision statement of an existing regional organization. Below the vision statement is a series of questions that you can use to evaluate the quality of the vision statement. I would like for you to prepare a response to each of the questions that are posed under the 'key elements' column. Space has been provided to the right of each question for you to write your comments.

How about if we get in smaller groups of 4-5 persons to do this activity. Work as a small group to develop a unified response to each question."

[NOTE: When the group has completed its work on this vision statement, show the next slide and ask the group to do the same thing using the second worksheet that has been provided to them.]

**Slide: 9**

**Time: 20 Minutes**

**Activity: Small Group Activity**

**Workbook: Worksheet Two**

**Let's Try it Again**

**VISION STATEMENT:** WEEDC will be the business-driven, business-led organization focused on creating prosperity and recognized for generating economic value and a high quality of life throughout the Windsor-Essex Region.

Key elements	Your Comments
What's the focus or main theme?	
What are the hopes and aspirations?	
Does it focus on the future ?	
Does it express purpose and values?	
Does it inspire?	
Relevant for many years?	

**Instructions:**

Have the group repeat the process they used for slide eight. Keep the participants in the same small group.

**Script:**

“Now, I’d like you to stay in your same group and complete another assessment, but with a vision statement from another regional group. Assess the quality of this statement using the same set of questions. Use worksheet two to complete this activity. Again, work together in your small group to create a unified response to the questions on the worksheet.

[NOTE: After both activities have been completed – this should take a total of about 15 minutes, go ahead and ask for comments from the participants. Feel free to call on someone from each of the teams to offer their comments. Spend about five minutes discussing the two vision statements and then move to the next slide.]

Let me ask for some feedback from you about these two vision statements. On the basis of the key elements that were provided to you in the worksheet (and on our slides), what would you say are the strong points and weak points of the two vision statements? Let’s start with the first one. [Go ahead and get comments from each of the teams.]

Now, how about the second vision statement? How did it measure up? Was it stronger than the first one and if so, why? Let’s get some of your reactions.

What would you say are the important points to remember from this group activity that might be of benefit to your team as you seek to develop or refine your vision statement?” [Ask for brief comments and then move to the next slide.]

**Slide: 10**

**Time: 1 Minute**

**Activity: Group Activity**



***Instructions:***

Now that the group has had the opportunity to evaluate the pros and cons of two vision statements, we now want participants to begin tackling the development of their own vision statement as a regional team. Again, if they already have a vision statement, then we want them to work on refining it based upon the core elements that a strong vision statement should contain. This slide simply introduces them to their next group activity.

***Script:***

“The small group work we’ve just completed on the two vision statements should be great preparation for this next assignment. We’re going to work together on creating a vision statement for your regional team – or refining your vision statement if you have one already developed.”

**Slide: 11**

**Time: 40+ Minutes**

**Activity: Small Group Activity**

**Workbook: Worksheet Three**

### Step in Building a Vision Statement

**1. Each Person – Reflect on the Following:**

What does this region look like in 20-30 years? How and where do people live? What do they do for work? What are your hopes/aspirations for the region?

**2. In Small Groups, Share Your Ideas**

Discuss ideas; determine common themes; agree on key ideas/themes you feel are most important for your region

**3. Report Your Small Group's Key Themes with the Whole Group**

Identify the common themes and opportunities; select the most important themes and opportunities

**4. Develop an initial draft of a vision statement**



Source: Adapted from *The Power of Appreciative Inquiry 2nd Edition*.  
Diana Whitney and Amanda Trosten-Bloom (2010)

#### **Instructions:**

The work we want the group to do with regard to a vision statement is outlined in this slide. It aligns with the step-by-step process presented earlier in slide seven.

Step 1: Have each person think through the questions outlined in item one. The key is to have individuals consider their long-term aspirations for the region. In 20-30 years from now, what does the region look like? What will be the key components of the economy? Are there quality of life factors the group wants to include in its vision? The bottom line is to get them to think long-term.

Step 2: Ask the participants to work in small groups (4-5 persons) so that each person in the group can share his/her ideas with the others in the group. Have each small group agree on common themes/ideas. Someone from the group should be then prepared to share their themes/ideas with the total group.

Step 3: Have each group present their ideas/themes. Write these down on a flipchart so that the group can see everything that is being offered as possible ideas/themes. Once each group has shared their information, ask the group to agree on the major ideas/themes. One easy way to do this to have them place a checkmark by THREE ideas/themes that they want to have included in their vision statement. Have them use a magic marker and ask them to check the three ideas/themes on the flipchart paper that they would like to see incorporated in a vision statement.

Step 4: Finalize the themes to be included in the vision statement and then have them write a vision statement. Ask them to work in the same small groups for five minutes or so and then ask each group to share their vision statement. Get the entire group to decide on which vision statement they most agree with. Let them recommend some minor or modest changes to that vision statement. If appropriate, ask if a team of 3-4 people who would like to take a stab at preparing the next draft of the vision statement. That team can either stay after the meeting to work on the statement or can try to have it ready for the next meeting of the regional team.

**Script:**

“It’s time to focus on a vision statement that aligns with the long-term hopes and aspirations that you have for the region. Our slide outlines the four steps I’d like for you to work through over the next 30-40 minutes. I would like to begin by having each of you think of the questions that are presented under step one. Jot down your ideas on the ‘Vision Statement Worksheet’ (worksheet three) that you’ve been provided.

[After five minutes, state the following:]

Okay, let’s get in groups of 4-5 persons. I’d like for each of you to share your thoughts and ideas with the members of your small group. Then, see if your group can agree on some common ideas or themes. Be ready to share those ideas/themes with the entire group in about 10 minutes.

[At the end of the 10 minutes, ask each group to report out to the rest of the meeting participants. Write the themes on the flipchart paper.]

We have a good working list of ideas/themes from our small groups. Now, each of you is being given three votes. What I’d like you to do is place a checkmark by the THREE ideas/themes on the flipchart paper that you feel should be included in team’s your vision statement. I have some magic markers available for you to use.

[Have them vote right on the flipchart paper.]

Okay, here are the themes that received the most votes.

[Go ahead and read these aloud. See if there are some of these ideas/themes that can be consolidated so that you can reduce the number of ideas/themes to a more manageable number to be considered for inclusion in the vision statement.]

Now, here’s the fun part. We need to try to prepare a vision statement that incorporates these major ideas or themes. Work in your same small groups and try to take a stab at writing a first draft of a vision statement.

[After five minutes or so, ask each group to share their vision statement.]

Let’s hear what each group came up with as a vision statement. . . [After each group has shared their vision statement, say the following:]

Which of the vision statements do you feel best captures the ideas/themes we’ve agreed to? What needs to be added or modified to this strongest vision statement? Are there ideas/themes from some of the other vision statements that we need to blend into this ‘best’ statement?

[If it appears that the changes that need to be made will take too much time, go ahead and offer the following:]

I think we are getting closer to having a vision statement, but it appears that it will take a bit more tweaking. Do we have 3-4 people who would be willing to work on developing a good working draft of a vision statement that can be reported back to us when we meet next time?

[If you get people to volunteer, then say:]

Great, thanks for agreeing to do this. We look forward to getting your vision statement report at our next meeting. In the meantime, I urge others in the group to get input from people you know in the community and region. Share with them the major ideas being incorporated into the vision statement and get their thoughts and reactions. We can discuss these comments next time.”

[If the team ends up doing the next Module right after this one, you may want to see if the small group you appointed can meet during the break to continue working on the vision statement. If this is not feasible, then see if they can be ready to present the revised vision statement at the next scheduled meeting of the team.]

***Additional Comments:***

If the group already has a vision statement, urge them to still work through this activity so that they can determine if the ideas/themes they come up as part of this exercise are consistent with, or are different from, the major ideas/themes that are incorporated in their current vision statement. Ask them to consider making changes to their vision statement in light of the results of this small group activity.

## Slide: 12

**Time:** 2 Minutes

**Activity:** Instructor reads the bullet points

### Now . . . Focusing on Regional Goals

#### General Definition of a Goal:

- Describes what your regional team is expecting to achieve
- Can be short, intermediate, or long-term in nature
- It can build on the unique assets/strengths and/or address identified needs of the region



#### ***Instructions:***

With a vision statement well on its way to being developed, the next logical step is to develop goal statements. This slide offers some general guidelines on what goals are all about.

#### ***Script:***

“Your vision statement is big and ambitious – something you hope you can achieve some day. Goals, on the other hand, are more concrete and reflect what you truly want to attain as a team. Goals can be short term (less than one year), intermediate (somewhere between 1-5 years), and long-term (more than five years before the goal is achieved).

Your goals should embrace the unique strengths and assets of your region. For example, if your region is blessed with a number of natural resource amenities, you may consider a goal that seeks to build on these assets (for example, recreation and tourism). If your region’s strong suit is the health care sector, you may want to pursue economic activities that build on that specific strength.”

**Slide: 13**

**Time: 2 Minutes**

**Activity:** Instructor reads the bullet points



**Instructions:**

Read the quote from BusinessDirect.com

**Script:**

“Here is what BusinessDirect.com offers as a definition of a goal,

[Read the statement out loud to the participants and then say the following:]

The notion that a goal is a dream with a deadline is very interesting. When we talked about a vision statement, you were urged to dream big. Goals are a different version of a dream – they have to be observable, definable, measurable, and capable of being met within a reasonable period of time. So, they’re not things that are likely to take 20 or 30 years to achieve. The time span for achieving goals is much shorter.”

**Slide: 14**

**Time: 4 Minutes**

**Activity:** Instructor reads the bullet points

## Developing a SMART Goal

- Let's be honest !! Developing a goal is no easy task for a team
- But, vague goals translate into vague results
- The key, then, is to figure out the key ingredients of a well-developed goal
- One possible solution? Prepare a goal that's **SMART**



***Instructions:***

Let the group know that developing goal statements is demanding and thus, cannot be completed in short-order. Taking the time to develop strong and clear goals can pay dividends down the road. So, share with the group the importance of creating SMART goals.

***Script:***

“Some of you may have had past experiences developing goals – personal goals, ones related to your own business, or ones that you’ve had to prepare for your employer. All I can say is that developing solid goals is tough work. And the more people who get involved in creating goals, the more demanding the process becomes (although getting others involved is important). So, your team has a real challenge ahead – preparing strong, concise goals that offer you (and others) a clear roadmap of where your team is heading over the next few years. What we hope to do in the remainder of this session is to help you develop SMART goals for the region.”

**Slide: 15**

**Time: 8 Minutes**

**Activity: Instructor reads**



**Instructions:**

Explain to the participants what the SMART acronym means. These are outlined in this slide. Then present the key elements that are associated with each of the SMART components. For example, the first letter refers to the need for each regional goal to be SPECIFIC. Listed to the right of the word SPECIFIC are ideas on how the team can address this first element. In particular, they can state what they want to achieve, why it's important to do so, and where they intend to focus their efforts. Please make sure you highlight each of the five dimensions of the SMART goals, including a bit more description of what each means.

**Script:**

"SMART refers to the five components that are critical to the development of sound goals.

**S means Specific:** It's very important to know what your team wants to achieve, and where you plan to pursue some of your goals. It's possible that some goals will be region-wide in focus while other goals will be targeted to a smaller geographic area or to a certain segment of your region's population. As you develop specific goals, take the time to think through why these goals are important to the advancement of your region.

**M means Measurable:** Given the increasing attention to accountability, it's in your team's best interest to develop measures that will allow you to document whether you are moving in the right direction in terms of achieving your goals. So, think about the ultimate outcomes you want to achieve and the measures that want to use to document your progress along the way.

**A means Attainable:** Avoid embracing goals that are at odds with the current or anticipated resources that will be available in your region. Consider goals that align with the assets and comparative advantages that your region enjoys. Some of these, by the way, will be determined in greater depth in Module Five.

**R means Realistic:** Pursue goals that your team honestly believes it can accomplish; avoid wishful thinking or a 'pie in the sky' types of goals (those that are unlikely to ever be realized).

**T means Time-Framed:** It's important to have timelines for each of your goals. Let's face it, if you don't have target dates that you're shooting for, then you're likely going to muddle along, having no clear sense of what key actions need to be undertaken and by when. In order to keep things on track, build a timeline of when your team goals are to be realized.

I can assure that if you work hard to build (or refine) your goals using SMART principles, then you'll find that the work of your team will go smoother and your ability to communicate your plans to others in the region will be more effective and persuasive."

**Slide: 16**

**Time: 15 Minutes**

**Activity: Group Discussion**

## Examples of SMART Goals

**Goal 1:** Increase the survival rate of new business start-ups from 50% to 75% in the Big Coast Region by December 2014.

**Goal 2:** A public/private funded business incubator center will be established in the Big Coast Region by December 2012; 15 business incubator firms will be housed in this center by December 2014.



### **Instructions:**

The following are examples of SMART goals. Use the script below to demonstrate how the goals outlined on this slide meet the conditions of a SMART goal. It's important to make sure the team realizes that a SMART goal is not intended to describe the detailed strategies and activities that they'll be undertaking in order to achieve these goals. That is something that we'll address in far more detail in Modules Eight and Nine.

### **Script:**

"Here are a couple of examples of SMART goals. Let's dissect the first goal statement so that we can see if it truly meets all the conditions we've been discussing.

Let's see if it's specific. The answer is 'Yes' – it focuses specifically on business start-ups in the Big Coast Region.

Is it measurable? It states that the team wants to enhance the survival rate of new business start ups – which it defines as those less than five years old – from 50% to 75%. So, there are some clear overall metrics that are incorporated into the goal.

As to whether the goal is attainable, the team needs to determine if resources are available to help support this goal. Let's assume that the team discussed this matter and noted that they could work in partnership with Cooperative Extension educators and community college small business center staff to help deliver needed programs and technical assistance activities to these individuals. So, even though these resources are not noted in the goal, it's important for the team to have some discussion of the assets/resources that are available in the region in order to ensure that their goal is attainable.

Is the goal realistic? That's an issue that might generate different responses from you. Certainly, this is a judgment call, but what if you discover in doing some background research that educational programs tailored to the needs of businesses, along with technical assistance activities, constitute two key factors that have been found to significantly improve the survival rates of new business start-ups? That kind of information can be invaluable in helping determine if your goal is realistic. So, the best way to ensure that you have a sensible goal is to do some research – delve into relevant research articles, speak with

knowledgeable people in the Cooperative Extension Service, the state office of USDA Rural Development, community colleges, small business development centers, chambers of commerce, state commerce department, etc. Doing some solid homework can help you build realistic goals.

Finally, let's see if the goal is time-framed. You'll notice that the goal clearly states that the Big Coast Region wants to move from a 50% to a 75% survival rate of business start-ups by December 2014.

What are your thoughts about the second goal? Does it meet the conditions of a SMART goal?"

**Slide: 17**

**Time: 8 Minutes**

**Activity: Individual work and Group Discussion**

**Workbook: Worksheet Five**

Are Your Goals SMART?	
GOAL: Develop a business environment that encourages entrepreneurs and supports emerging entrepreneurs through training and shared marketing efforts	
	Write Your Comments Below
Specific	
Measurable	
Attainable	
Realistic	
Time Framed	
REVISION OF YOUR GOAL?	

**Instructions:**

We want the group to review two goal statements and to identify where these goals meet, or fall shall, in incorporating the five elements of a SMART goal. These goals are actual statements that were prepared by two different regional teams. Let the participants evaluate both statements. Have them use the Goal Statement Evaluation: worksheet five for this goal and worksheet six for the goal statement on the next slide (Slide 18).

**Script:**

“Our next two slides contain goal statements that were prepared by two regional groups. We’re going to take a few minutes to critique these goal statements. We want us use the guidelines associated with a SMART goal. So, go ahead and find the worksheet titled ‘Goal Statement Evaluation: worksheet five.’ Read the goal and then see if you can examine how well the goals meet each of the five components of a SMART goal. Write your comments in the right hand column of the worksheet. I’m going to give you about five minutes to do this.

[After five minutes, if it appears that everyone is done, open it up for discussion. Go ahead and say:]

Okay, let’s see what your thoughts are about this goal statement. Who wants to begin?”

[Try to get the participants to share their reactions to the goal and when you feel the main weaknesses have been identified, move to the next slide.]

**Slide: 18**

**Time: 10 Minutes**

**Activity: Individual work and Group Discussion**

**Workbook: Worksheet Six**

**Are Your Goals SMART?**

**GOAL:** Attract and develop a variety of agricultural related businesses that will support the growth in farm income: feed stores (bulk and bagged), and use and processing of meat by-products. Goals of increasing agriculture-related businesses will include 10 new businesses a year for 5 years.

	Write Your Comments Below
Specific	
Measurable	
Attainable	
Realistic	
Time Framed	

REVISION OF YOUR GOAL?

**Instructions:**

Have them evaluate the goal statement on this slide using the same process used for the previous slide.

**Script:**

“Let’s try this one more time. Examine the goal statement on this slide, and evaluate it using the same process we just used with the first goal statement. Worksheet six should be used to evaluate this goal statement. Again, I’m going to give you about five minutes to study and evaluate this specific regional goal.

[After five minutes. . .]

Let’s hear your thoughts about this statement. I’d like to start by asking those of you who’ve been pretty quiet to chime in at this point.

[NOTE: If people have been actively talking, then don’t use this previous statement. But if some people have not spoken very much in the meeting, call on them so that you can hear their perspectives on this goal statement.]

Are there other comments you want to add to what’s been offered so far? Is this goal statement a bit stronger than the previous one we evaluated? Why or why not?

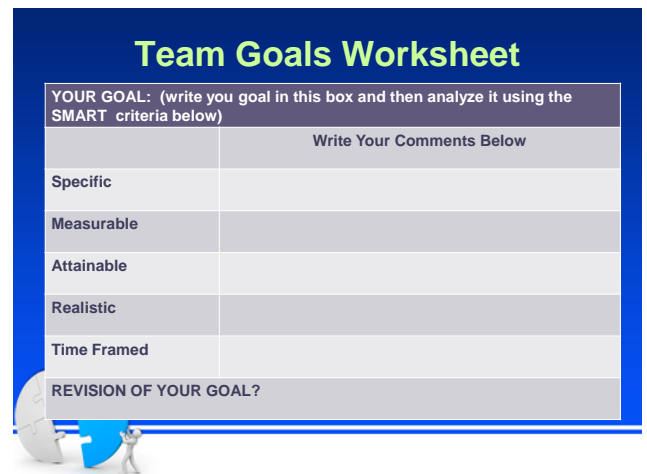
Thanks for your active participation in this discussion.”

## Slide: 19

**Time:** 20+ Minutes -  
depending on which option is  
selected

**Activity:** Option 1, 2, or 3

**Workbook:** Worksheet Seven

The graphic shows a worksheet titled "Team Goals Worksheet" with a blue header. Below the title is a box for "YOUR GOAL: (write your goal in this box and then analyze it using the SMART criteria below)". To the right of this box is a column labeled "Write Your Comments Below". The worksheet is divided into five rows for SMART criteria: Specific, Measurable, Attainable, Realistic, and Time Framed. At the bottom, there is a section for "REVISION OF YOUR GOAL?". A small 3D figure is shown at the bottom left of the worksheet, holding a blue ball.

YOUR GOAL: (write your goal in this box and then analyze it using the SMART criteria below)	
	Write Your Comments Below
Specific	
Measurable	
Attainable	
Realistic	
Time Framed	
REVISION OF YOUR GOAL?	

### **Instructions:**

Some regional teams have been working together for some time, so they may have goals already delineated. Others may be new teams with little history of working collaboratively on regional issues. They may have no goals yet developed or they may have goals that haven't been carefully scrutinized or evaluated. We're going to spend time now having the team evaluate their regional goals using the worksheets that we've provided in the workbook. If the team is not large in number, it's unlikely the team will be able to work through all of their goals in this session (that is assuming they have 3-5 goals already proposed as part of their regional work). So you're going to want them to work through two of their regional goals in this session, if possible. On the other hand, if the team is a decent size (around 16-20 people), then divide the group into small teams of 4-5 people and assign each a different goal to work on using the SMART principles.

In the event that the team doesn't have any goals specified, this will give them an initial opportunity to begin developing goals that are consistent with their vision statement. If they use the SMART guidelines, they should be able to begin developing strong goals that address the opportunities and needs they see in the region.

### **Script:**

"It's now time to take a hard look at your own regional goals. You'll find in your workbook a worksheet titled 'Analyzing Our Team Goals' (worksheet seven). As you can see, we've left the top portion of the worksheet intentionally blank. Write each of your regional team's goal statements on a separate copy of this worksheet. We want you to carefully evaluate each goal to see how well it aligns with the important elements of a SMART goal. If you feel there are weaknesses in the goal statement, offer language that you think will make the goal stronger – that is, will help make it a SMART goal.

[OPTION 1: If the group is large, divide the team into three or four small groups. Assign each group a different goal – assuming the regional team has at least 3 -4 goals that it has developed prior to taking part in this SET training. Ask each small group to start evaluating the goal they've been assigned. Give them about 10 minutes to complete this activity.

OPTION 2: If the group is not large enough to divide into small group teams, then ask them to start with their first goal and work together to determine how well it meets the requirements of a SMART goal. Have them work through two goals in this session, if at all possible, leaving the other goals to be completed after this session and prior to the next scheduled meeting of the group. This activity will take a bit longer to complete since the entire group is working through a minimum of two goals as part of this exercise.

OPTION 3: If the regional team has yet to develop any specific goals, this is the time for them to start doing so. If the group is large enough, ask them to work in teams of 4-5 persons to identify some possible goals. If the group is not large, ask them to brainstorm on what the focus of their goals should be. Get them to agree on 3-5 major ideas that can be converted into goals; then get them to begin writing specific goal statements that align with their key ideas using the elements of a SMART goal as a guide. This process is likely to take a good bit of time, so use your best judgment as to how many goal statements they'll have time to work on during this session. It's possible that you'll have to ask the group to meet outside the SET training sessions to continue working on these goals. They can report their results at the next meeting of the group, at which time the team can work on fine-tuning these goals.]

Let's hear what you had to say about each of the goals and your recommendations on how to make the goal stronger, if necessary. Let's start off with the first goal.

[If you had a small group working on goal one, have them share with the entire group their assessment of that goal and the improvements they would recommend. Once they've shared their input, ask the rest of the group for their comments and advice on goal one. Next, move to the goal two report and repeat the process until all goals have been addressed.

On the other hand, if the group is not large enough to divide into groups, ask them to work on a revision of each of the goal statements they've evaluated during this session.

Finally, if this is the first time the group has worked on goal statements, take the time now to review what the group (or small groups) developed and open it up for discussion on what changes/refinements might be needed in the goals statements that the team drafted in this session].

This has been a very productive meeting and I want to express my thanks for your hard work in carving out some strong vision and goal statements to guide the work of your team. This is very useful information on which we will build in the upcoming SET modules."

**Slide: 20**

**Time: 3 Minutes**

**Activity: Group Discussion**

## Final Reflections

- What did you find most helpful and valuable in this module?
- Any concerns about the need to further refine your goals?
- Are there any items covered in Module Four that need to be clarified?



### ***Instructions:***

Take a few minutes at the end of Module Four to ask individuals what they felt with the major takeaways. What did they find most valuable and what remains a bit unclear to them? Take the time to clarify these items, as appropriate.

### ***Script:***

“Let’s take this time to reflect for a few minutes about Module Four. Tell me what you found most useful or valuable? What, if anything, remains a bit fuzzy to you? What needs to be clarified? Any other thoughts or observations about this module?”

**Slide: 21**

**Time: 3 Minutes**

**Activity: Group Discussion**

## Homework Ideas

- Team members who've volunteered to continue working on the vision and/or goal statements need to find time to meet. Prepare report for the next meeting of the regional group.
- Other team member can ask 2-3 local individuals for their thoughts/reactions to the team's vision statement.
- Getting input/reactions from others in the region on the revised goals (even if they're still not quite in final form) would be useful as well.
- Other items?



### ***Instructions:***

Review with the team some of the specific activities that might need to be completed prior to the next meeting of the team.

### ***Script:***

“We did some excellent work in this session, but there are some items that need to continue working on between now and our next face-to-face meeting together. Listed on the slide are some of the possible items that we need to complete before our team meets again. Let’s decide which ones we want to make some good progress on before our next meeting.”

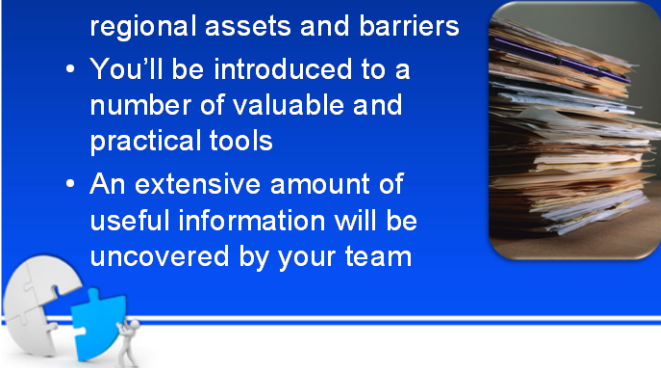
**Slide: 22**

**Time: 1 Minute**

**Activity:** Instructor reads the bullet points

**What's Ahead**

- **Module Five** focuses on regional assets and barriers
- You'll be introduced to a number of valuable and practical tools
- An extensive amount of useful information will be uncovered by your team

A blue slide titled "What's Ahead" with three bullet points. To the right of the text is a rounded rectangular image showing a stack of papers. At the bottom left of the slide is a small 3D illustration of a person placing a blue puzzle piece into a larger grey puzzle piece.

***Instructions:***

Briefly review what will be covered in Module Five