



VALUES VISION & GOALS

an adventure in setting goals that matter

created by Cecily Breeding

WHO IS THIS FOR?

YOU.

First time setting goals?
Four hundredth time setting goals?
New Year's resolution time?
Leading a group?

This adventure is for you.

I put this workbook together based on a decade of goal setting in my own life and leading groups large and small to set and crush their own goals.

The exercises found here can be completed:

solo
with friends
with coworkers
with your AA group
with your staff
with your small group
with your mom
with your classmates
with the person next to you on your next airline flight.

These exercises only work if you do them. So...

Let's do this.

Cecily

For additional reading and info on the many sources I've drawn from to create this experience, check out www.cecilybreeding.com/goals



GETTING STARTED FOR LEADERS

Do you set goals? Then you can coach someone to do it! That's what qualifies you. **You cannot lead others somewhere you haven't been yourself.** Leadership of others only comes after leadership of self. In order to authentically share this process with others, it has to be real and present in your own life.

MATERIALS NEEDED

To lead this group goal setting experience, you will need:

- A printed set of worksheets for every participant (plus a couple extra). Print a set of the worksheets for yourself and go through this process right along with the group. This is a sign of solidarity and also demonstrates that you live this discipline too.
- Pens for every participant
- A stack of blank pieces of paper for the Vision Writing exercise (or use the back sides of the worksheets, or have participants bring a journal)
- A white board or over-sized Post It paper for drawing the exercises
- Laptop or phone and speaker for playing inspiring music during the silent writing portions

MAKE IT A MEANINGFUL EXPERIENCE

Though goal setting is a cerebral process (thoughts and words), it frequently becomes emotional. Chances are someone will become emotional during this session, and that's normal and wonderful. An emotional response means this stuff matters.

Research shows that a person's psycho-emotional well being is directly tied to the wellness of the physical body. **Do what you can to make the group physically comfortable. People who feel free will think freely.** Some things to keep in mind:

- Consider the senses: dim the lights, burn candles, diffuse essential oils, have comfortable furniture or even encourage people to sit on the floor, consider going bare foot
- Pair this with an activity: a yoga class, a sweaty hike, or a shared meal all create community
- Think about the way you want this session to feel. Want it to be energetic and exciting? Plan a goals breakfast. Want it to be soulful and contemplative? Have this session at night in someone's home with a bottle of wine.

WELCOMING AND FRAMING

Welcome.

Introduce yourself and why you're leading this group. Tell a story. Share your experience with goal setting. Here's a version of my welcome talk:

"Goal setting changed my life. This exact process we're about to do together helped me identify what I wanted to move toward and gave me the tools to do it. Goal setting gave me deeper relationships with my family after I set a goal to call a family member every week for a year. Goal setting helped my husband and I pay off all our student loan debt after we set a goal to get on a budget and track our monthly spending. Goal setting also helped me get over my fear of swimming in the ocean and eventually complete a triathlon that included an ocean swim. This practice that I'm about to teach you will change your life if you let it."

Housekeeping and preview of format.

Explain that this is a series of exercises and worksheets. It's an individual process that we'll complete in community together. It usually takes around 90-minutes to 2-hours, but you can condense or stretch it to fit your allotted time. Preview when the break will be (I recommend a ten-minute break halfway through). Share where the bathrooms are. Invite participants to refill their plate/coffee/wine as needed. Invite questions. Establish an atmosphere of ease.

Opening question.

If time permits, I like to take the time to go around the circle and **have everyone share their experience/personal feelings about goal setting**. It's likely that some of the participants in your group are arriving with a little baggage about this area of their lives. Create the space for an honest share and clearing of apprehension, skepticism, excitement, fear, enthusiasm, embarrassment, etc. Validate, validate, validate. Thank each person for his/her candor. Going around the circle one by one creates buy in, community, and primes everyone to share later.

START HERE >>

Intrinsic vs. Extrinsic Goals

You've probably noticed by now that goal setting is having a moment. Everywhere you look, there's #goals. And it's very common these days for someone (and maybe this someone was you) to say, "Hmmm... I should set some goals," and then proceed to open up a magazine, or scroll Instagram, or check out the tabloids to see what the rich and famous "influencers" are up to.

Leaders: feel free to read this or explain it in your own words

And that's the most common starting point for setting goals:

look like *that*,
 drive *that* car,
 have *that* job,
 date *that* person,
 visit *that* resort in Bali.

But those are all extrinsic goals.

Extrinsic goals are defined by external factors such as the positive evaluation of others.

Most extrinsic goals orbit around the themes of fame, money, image, and conformity. Extrinsic goals are everywhere because our culture is set up to sell you things, but the problem with setting and working toward extrinsic goals is that you either (1) won't achieve it because you'll lose interest and enthusiasm for it (surprise, achieving any goal is hard) or (2) you'll achieve it and it will feel hollow and you'll wonder why it wasn't satisfying. Setting extrinsic goals is a sure fire way to set your goal setting up for failure.

Instead, what we're doing today is setting intrinsic goals.

Intrinsic goals are rooted in what is inherently satisfying to you.

Intrinsic goals tend to be more motivating over the long term and more fulfilling once accomplished, because you know *why* you set the goal in the first place.

To identify what would be intrinsically motivating to you, it's going to take a little work on the front end. We're not going to talk about goals until the end of our time together. Right now, we're going to take a look at what success means, as well as our values, and vision.

Discussion or journaling question >> Any initial thoughts or reactions to that?



THE CIRCLE

One of the reasons goal setting may have felt overwhelming for you in the past is because **you may have jumped right into attempting to set detailed goals without actually knowing what you want.** Our first exercise is called The Circle (next page), and it's a brainstorming activity that is meant to set the stage for creating goals by helping you identify two things: (1) what you want in your life and (2) what you don't want in your life.

I like to use the metaphor of an airplane flight. The Circle is your view from 30,000 feet. Big picture stuff. Think broad horizons, possibility, white fluffy clouds and a beautiful landscape that stretches for miles.

Set a timer for 5 minutes, and right now I want you to focus only on what's inside your circle—what you want. Write words, phrases, you can draw little pictures if you want. Also these can be abstract ideas (like love, laughter, connection) or concrete ideas (like a Great Dane puppy or a cabin in the Rocky Mountains).

Leaders: Draw a large version of the circle on the white board with the labels "I WANT..." and "I DON'T"

Leaders: Start a 5-minute timer, play some inspiring instrumental music (I'm a fan of lesser known film scores). Give the group time and space to write. When the timer rings... say: "Okay now I want to hear from you! What are some things you have written inside your circle. Just shout them out." Write on the board inside the circle as people list things off. Go until your circle is full. Try to hear from everyone. Add your own input periodically.

If you're doing this exercise in a group, it's particularly beneficial to share this process out loud. If someone says something you like, write it in your circle too! The person next to you who said "great sleep" didn't invent the concept of great sleep. If you want great sleep too, write it in your circle.

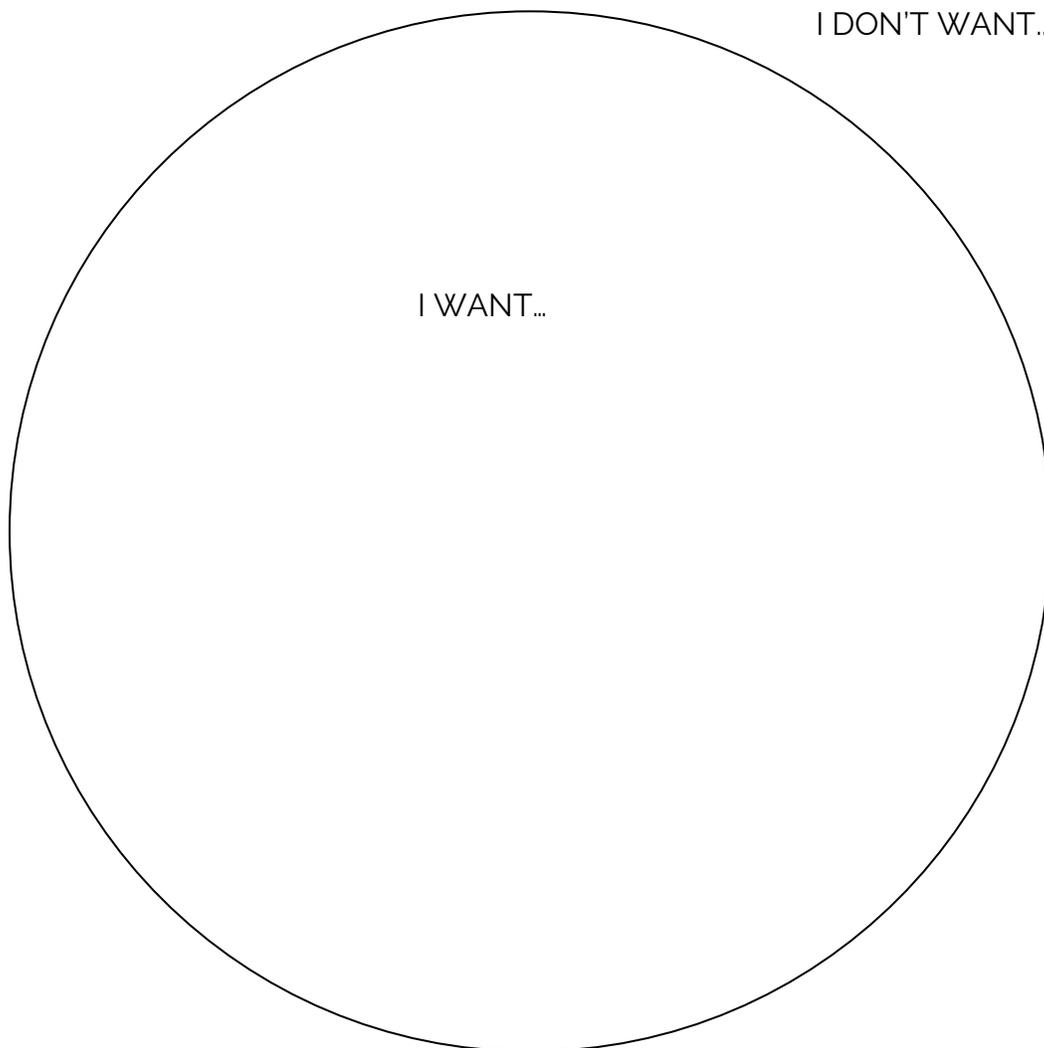
Okay now it's time to focus on the outside of the circle—what you **don't** want. Same rules. Five minutes.

It's time to move on from The Circle, but I want to make sure and share with you (especially if this is your first time setting goals) that **you are just getting started.** There is no way that you can figure out everything you want in your life in 10 minutes on a Tuesday afternoon. We're opening doors in your brain that perhaps have been closed for a very long time. You will probably be falling asleep in your bed tonight and your eyes will snap open with something you should have written in your circle. So take these sheets of paper home with you and leave them out on your breakfast table or nightstand. Let this be a living document in your life over the course of the next few days.

Leaders: Start a 5-minute timer, keep playing that inspiring music. When the timer rings... repeat the group sharing process with the outside of the circle, until it feels like the group is ready to move on.

THE CIRCLE

In order to work toward something, you have to know what you want! Use this simple brainstorming exercise to get clear. Place words and phrases that represent **what you want in life inside the circle**. Place **what you don't want outside the circle**.





WHEEL OF LIFE

Success means different things to different people. What's important for someone else may not be as important for you. For your goals to be intrinsic, your next step is to define what success looks like **to you** by using words, habits, phrases, etc.

You're answering the question, **"How will I know I've been successful in this area?"** Write your statements in the corresponding area of your wheel of life. Some examples might be: reading lots of books, getting enough sleep, a consistent yoga practice, involvement in a small group, etc.

What you write can have as much or as little detail as you want. Hint: don't feel like you need to come up with a bunch of new stuff; you already started doing this work by brainstorming in The Circle. So take a look at what you wrote in your Circle and start to flesh some of those things out.

Using the metaphor of the airplane trip, you're dialing in your navigation now, getting a solid grasp on where your destination is.

There's no wrong way to do it. If you want to drill down and just work on one slice at a time, feel free. If you want to bounce around and write wherever you feel inspired, that's great too.

Set a timer for five minutes and get started defining success!

Optional Self-Inventory:

Once you're done defining what success looks like in each spoke of your wheel, ask yourself how you're doing now in each of those areas. Give yourself a letter grade (A, B, C, D, F) for each spoke.

Leaders: Start a 5-minute timer, keep playing that inspiring music.

When the timer rings, use the white board to create a group success wheel based on what the participants share from their paper.

GOING DEEPER: THE HISTORY OF THE WHEEL OF LIFE

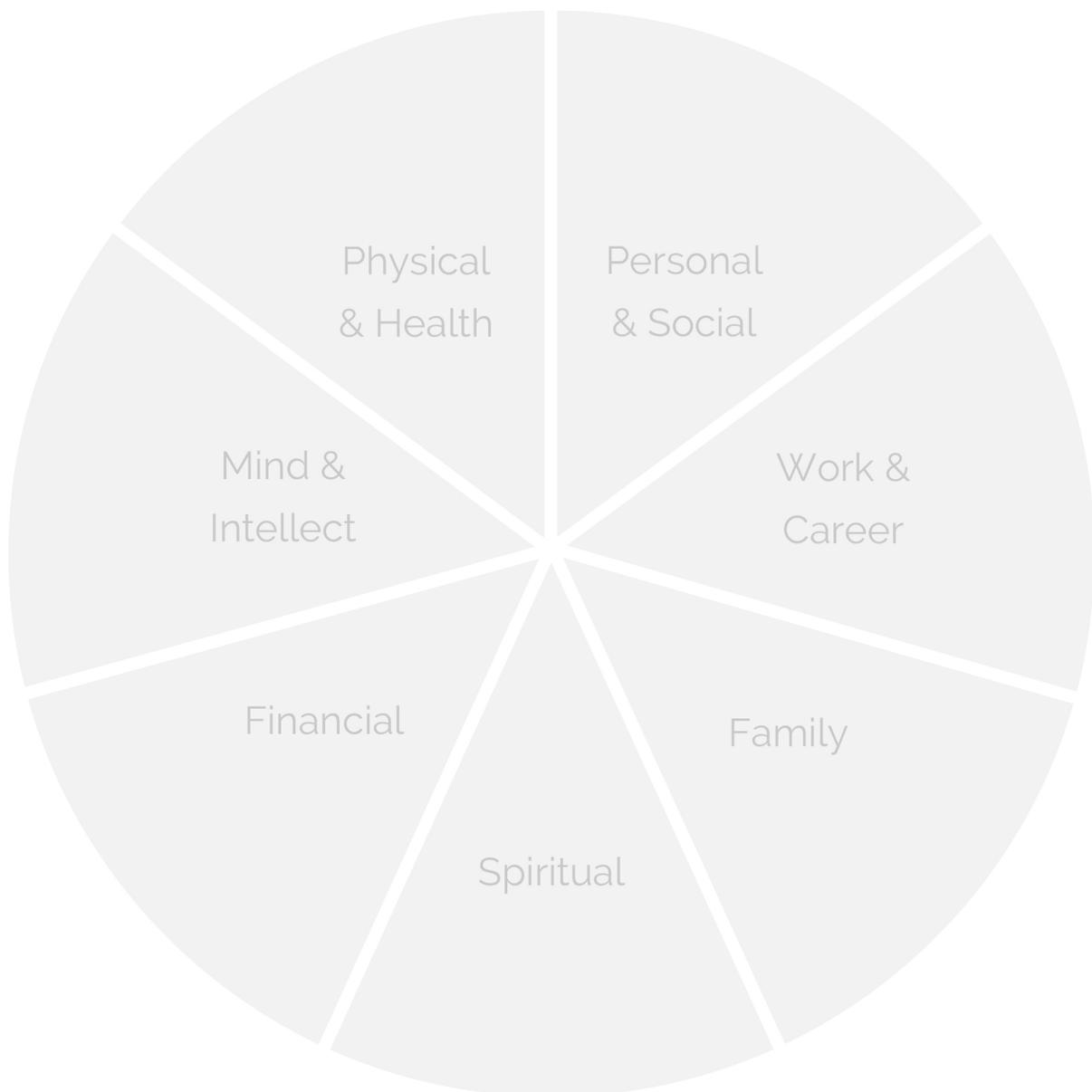
The concept of the Wheel of Life was introduced by Zig Ziglar, in his book *Born to Win*. Organizing the areas of life into a wheel acknowledges that they're all important and interconnected, so if one area is out of alignment, it puts strain on the others. As you consider what success looks like in the seven areas, and later set goals in those areas, remember that achieving success in one area might require temporary or long-term changes to another area. If success in my Personal/Social area means I travel more, it will likely affect my Financial and even Work/Career realities. If I set a goal to work out more (Physical & Health), it might require sacrifices in my Family or Social life.

WHEEL OF LIFE

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Some examples might be: reading lots of books, getting enough sleep, a consistent yoga practice, involvement in a small group, etc.





IDENTIFY YOUR CORE VALUES

BEFORE WE BEGIN: 1-MINUTE MEDITATION

Close your eyes and take three deep breaths. I want you to picture a person you admire. It can be someone you know very well or someone you've never met. Someone who you see regularly or someone who has passed on. What do you admire about them? Picture them doing or saying or being that thing. What have they taught you? What would you like to learn from them? What would you like to thank them for? Write that person's name down on a blank space on your paper. Now close your eyes again and think of another person you admire. (same instructions) Write that person's name down. One last time close your eyes and think of a third person you admire. (same instructions) Write that person's name down.

As you look at these three peoples' names, it's likely that you admire them because they embody core values that are meaningful to you. What do you admire about them?

We begin our Core Values exercise by thinking about people we admire because it's easy to understand values when we picture the people who live them out and the habits associated with them. If the person you admire is an excellent mom or dad, they likely embody the value of **Family**. If the person you admire is a central pillar of your community who makes everyone feel welcome and known and loved, they likely embody the value of **Community**.

Values are the core of goal setting.

In order to set and work toward goals that matter, it is critical to start with your personal core values.

Values are essential because they define what it is that you want out of life, and how you are going to behave to get it. Everyone has core values, whether they are aware of it or not. Our values help us make difficult decisions and guide how we spend our primary resources (time & money). Abraham Maslow, creator of the Hierarchy of Needs model, stated that self-actualization is defined as the achievement of one's uniquely defined values.

Back to the airplane metaphor, your values are your destination. They are your North Star and the horizon you are chasing.

The 21 core values listed on the next page were developed as part of a 30-year study called the Values Arrangement List (VAL) Survey. Obviously, there are way more than 21 values in this world (there are hundreds!), but the words printed on your paper should be considered categorical. For example, "power" could comprise many other values such as authority, control, influence, leadership, strength and so forth. If one of the words in bold doesn't quite capture your value, write down another word that does. For example, discipline is one of my values, but it's not on this list. Words mean different things to different people, but these are your values, so choose words that are meaningful for you.

Take a first read through the list of values and check the boxes for the values that stand out to you. Then start to narrow down your list to 4-5 core values. Then rank them on the lines at the bottom of the page from 1-5.

Having trouble? Try putting the values in conflict

As you're narrowing down your list of values and ranking them, it can be helpful to imagine a scenario where two of your values are in conflict with one another. For example, if **Family** and **Adventure** are both values of yours, imagine a scenario where you're given the opportunity to move away from your loving and tightly knit family for a five-year contract as a sailboat captain, charting currents in the South Pacific. Does family or adventure win out?

These are your values TODAY

The result of this exercise reflects the importance you place on these values **today**. Don't create a values list that reflects the way you wish you were. It is likely that your values and value system will change as you evolve and become more conscious of what is really important to you. New life experiences, the natural maturation process, and major life events both good and bad, often cause individuals to rethink their life's priorities. I encourage you to revisit this exercise periodically, with an open mind to change.

Leaders: On Values Guilt

Participants frequently express dismay and frustration at having to narrow down their list of values. It feels like they're throwing out good stuff! If this happens, assure everyone that not having **Family** (or some other traditionally ideal value) at the top of your list doesn't make you a bad person. I think we can all agree that we all value all of these things. They're values! That's what makes them all good. But in our quest to hone in on our intrinsic goals, we're going to have to narrow our focus.

Optional Additional Questions

Look at your list of top 5 values and decide if there's something missing. Is there a value you wish was on your list? Stoic philosophers such as Aristotle taught that we become what we repeatedly do. If I want to become more generous, I should do generous things until it becomes a habit. If I want to become truthful, I should tell the truth until I have a keen sense of honesty. These are known as "aspirational values." Select one aspirational value and add it to your list, as something you would like to cultivate through your goals.

Have participants share their #1 core value. Write everyone's core values on the board.

How do you see your #1 core value show up in your life today?

On a scale of 1-6 (1 being never, 6 being all the time), how do your current life choices move you toward your #1 core value?

IDENTIFY YOUR CORE VALUES

Read through the list of values and check the boxes next to the values that stand out to you. Once you have selected all the values that resonate with you, narrow the list down to 4-5 core values, then rank them 1-5 on the lines below.

- Achievement:** attainment of goals and aspirations
- Adventure:** pursuing excitement and taking risks
- Aesthetics:** appreciation and enjoyment of the arts
- Community:** activity in social or citizen groups
- Equality:** justice and fair treatment for all
- Fame:** being recognized and known for your contributions
- Family:** close relations and support of loved ones
- Freedom:** independence in thought and lifestyle
- Fellowship:** having important relationships with friends
- Happiness:** satisfaction, joy and contentment
- Health:** soundness of body and mind
- Love:** intimacy, devotion and warmth
- Nature:** respect for animals and the environment
- Peace:** enduring harmony and freedom from violence
- Pleasure:** entertainment, relaxation and fun
- Power:** authority, control and influence
- Self-worth:** high regard for oneself and others
- Social Service:** contributing to the welfare of others
- Spirituality:** at one with God; religious beliefs
- Wealth:** affluence, ease, and prosperity
- Wisdom:** insight, knowledge and understanding

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WRITE YOUR TEN-YEAR VISION

Find some writing space. This can be the space provided on the next page or a page in your journal. The next step is to write your ten-year vision.

A vision is a statement of your ideals.

Organizations have vision statements. Every leader has to have a vision. Now, so will you.

But don't stress! The work you've completed so far (The Circle, Defining Success, Core Values) has primed you to write your ten-year vision.

Date and Age

Before we begin, start by writing the date, ten years from today, and your age. *"It is _____, I am _____ years old."* This starts by abruptly bringing the future into present terms. WHOA. Yes, you WILL be that age some day.

Formatting

- You might like to write your vision **like a journal entry**, starting with the details of the scene you experience the moment you wake up.
- You might want to **write bullet points, even phrases**, briefly explaining with some detail and some broad strokes, what your present (in the future) life is like.
- You might try making this **a series of statements**. "I am _____. I choose _____. I love _____. I stand for _____."
- As long as you keep your content in the present, using now language, you're doing it right. Write as much or as little as you want. You'll know when it's done.

Leaders: Read the whole prompt in the gray box out loud. Start a timer for 10-15 minutes. Play music. Give space. When it seems like the group is finishing up, invite a couple volunteers (or everyone, depending on timing and group size) to read their vision out loud. Honor whatever emotions come up.

VISION CREATION PROMPT

Listen to following as you begin to gain a clear picture of your vision for your life 10 years from now. You may have specific answers to some of the questions, and some might simply be food for thought.

- Imagine your life 10 years from today.
- That's 520 weeks from now or 3650 days.
- You are unlimited.
- You can be and do anything in the world.
- Time, money, education, experience are no issue. You have zero constraints in the world. What do you do?
- What does it look like? What does it feel like to love every minute of your life?
- What does a day in your ideal life look like?
- What do you value most?
- Where do you live?
- What do you eat? Who do you eat with?
- What does the community feel like?
- Who is there with you?
- Are you single, married, living with friends?
- Do you have children, pets, or maybe plants?
- Do you work? If you are working, where from (an office, your home, the beach?)
- Do you volunteer?
- Do you go to school? Form of education?
- Do you go on adventures?
- Do you travel? Where to?
- What do you do in your free time?
- What gets you out of bed every morning?
- What are you grateful for?
- What brings you joy?
- What are you most proud of?



WRITE YOUR GOALS

Whew! Didn't I tell you there would be a lot of work before we even got to the goal setting? But **now** you're ready to set goals that are intrinsic, rooted in your unique values and vision for your life.

Look back over your Circle, Wheel of Life, Values list, and Vision, and try turning what you see into some goals. Use the following formatting criteria to guide you in setting goals that matter.

It's time for you to write goals that are Specific, Measurable, Achievable, Relevant, Time-Oriented, Written, Approach, and Present (SMARTWAP).

Specific

Your goals should have detail to them. The more detailed, the greater the likelihood that you'll work to achieve them, because you will know exactly what you need to do to make it happen.

The more specific you can make it the better.

NO: I run more.

YES: I run 20 miles every week of June, July, and August.

NO: I organize my closet by the end of the summer.

YES: I get rid of 50 articles of clothing, color-code my hanging clothing, and fold all my pants and shirts using the KonMari method by the end of the summer.

Measurable

Your goal should be "check-off-able." I even go so far as to write an actual box to check in front of all my goals.

You should know when it's done so you know when to celebrate!

One way to do this is by identifying the **core value** behind the goal and then identifying an **actionable indicator** that corresponds with that value. Do you want more health in your life? Identify practices that are indicators of health, such as eating, sleeping, and exercising habits.

NO: Make more friends this year.

YES: I eat lunch with someone I've never had lunch with once every month this year.

NO: Get fitter by September 15th.

YES: I run a mile in 7:00 by September 15th.

NO: Learn Italian by the end of 2020.

YES: I memorize flash cards of 200 Italian words by the end of 2020.

Achievable (or Attainable)

It should be possible for you. Only you can decide this. Given your resources (time and money), set goals that are challenging but possible. When you read your goals, they should make your heart beat fast, not fill you with dread.

Another key to remember here is to try to set goals that have to do with your action, not someone else's. Another way to say this is to set **input goals, not outcome goals**. For example, it can feel disempowering to put a "get married by next June" goal on your board, when it feels like there are a lot of factors that are out of your hands. Instead, identify steps you are in control of, such as setting up an online dating account, enrolling your friends in introducing you to their single friends, going to therapy to work on becoming the healthiest emotionally you can be, or attending (or starting!) a singles group at your church.

A quick note on achievability: people tend to shoot too high on their short-term goals and too low on their long-term goals.

NO: I am married by 2026.

YES: I create an online dating profile by July 31.

NO: I am at my goal weight by the end of next month.

YES: I attend 20 workout classes by the end of next month.

NO: I am a NASA astronaut by December 2020.

YES: I attend Space Camp by December 2020.

Relevant

They should be your goals—not your doctor's goals, not my goals, not your mom's goals—**your goals**.

This is why the core values conversation is so important.

When you identify your core values, you are identifying your belief system. If you want to set goals that inspire you to work toward with wild abandon, they have to lead in the direction of your core values.

Period. Full stop.

Time-Oriented

Call it what you want: a deadline, a by-when. But your goals should have a time domain.

One way to do this is to **set a specific date** by which you want your goal to be accomplished.

Another way I like to do this is to **pick a timeframe** and set a goal to do a thing a certain number of times in that timeframe. I call these "chipper" goals, because you have to chip away at them. The idea here is that you find a way to tally up your progress as you make it over the course of a year.

I complete a half marathon by August 15, 2020.

I give away 300 possessions in 2021.

... I decided somewhere along the way that SMART just isn't enough. Your goals should also be:

Present

This is subtle but powerful. If you believe (and by now you should) that words are powerful, you can start by leveraging that power in the way you write your goals.

Write your goals as though they are happening right now. How to do that? **Remove the words "want to," "try to," or even "will" from your goal-setting vocabulary.**

If you write goals that take place in the future, you will always allow them to live in the future (even when the date technically rolls around on the calendar). But if you want your action to be here and now, your goals should be here and now.

Words create! Use them to create a sense of urgency.

NO: I want to run a marathon by August 31.

YES: I run a marathon by August 31.

NO: I will save \$3,000 by December 19th, for an international vacation next summer.

YES: I save \$3,000 by December 19th, for an international vacation next summer.

Approach

This is another subtle but powerful difference, based on the same principle that words create. Write approach goals, not avoidant goals; meaning goals that you move toward, not away from. **What you think about you move toward.** If I tell you not to think about elephants, what are you immediately going to think about? Elephants! The same is true with your goals.

If I write a goal that says, "I do not eat sugar after 6pm," then every time I walk past that goal on my goals board, what am I going to think about? Sugar! It's easy to turn that goal into an approach goal by re-writing it, "I eat only raw fruits and vegetables after 6pm."

This is all about **hacking the psychology of motivation.** It's relatively easy to identify a single path to accomplish an approach goal (do what the goal says: eat fruits and vegetables), but an avoidant goal has an infinite amount of ways to fail (all the various types of snacks!).

"A growing number of studies have shown that people who chiefly pursue avoidant goals (or construe their goals in avoidance terms) are less happy, and more anxious, distressed, and unhealthy, than people who generally pursue approach goals."

The How of Happiness,
by Sonja Lyubomirsky

NO: I do not eat sugar after 6pm.

YES: I eat only raw fruits and vegetables after 6pm.

Written

Last but not least (and this is personal opinion, based on years of doing this in my own life), you have to put pen to paper.

Accomplishing goals takes commitment and intentional action. **One of the ways you commit to your goals is by making them tangible: writing (or printing) them on real paper and hanging them somewhere you (and preferably people you live and work with) will see them often.** This is all about accountability.

What does this look like personally? I have a goals board in my kitchen, where my family, my guests, and I are always congregating. People read and ask me about my goals all the time, and I constantly have the opportunity to reinforce my goals (and remember why I started in the first place) in my conversations.

Use discretion. Obviously some goals are private. You don't have to post your annual income goal or you and your partners' baby-making goal for the world to see.

NOW WHAT?

Set a date in your calendar and to do this whole thing again in three to six months.

-----'S GOALS

TODAY'S DATE: -----

SHORT-TERM (UP TO 1 YEAR)

BY-WHEN

MID-TERM (1 YEAR - 5 YEARS)

LONG TERM (5 YEARS - 10 YEARS+)

S----- M----- A----- R----- T----- W----- A----- P-----