

How to Establish Goals:

A Group Project for Farmers and their Families



John Lamb, The Minnesota Project
and
Whole Farm Planning Interdisciplinary Team,
The Minnesota Institute for Sustainable Agriculture

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Background

In Minnesota, since 1992, many people have been talking about whole farm planning. An interdisciplinary group, the Whole Farm Planning Team of farmers, scientists, teachers, agriculture and environmental agency people, formed to investigate various aspects of whole farm planning.

Whole Farm Plan

When you plan to account for everything connected to the farm; you have a whole farm plan. It includes enterprise planning, making and testing decisions, setting goals, assessing resources, monitoring and feedback. If you leave something out of the process, it's only partial planning, not whole farm planning.

The Team worked together with other groups in the state and region who were also investigating whole farm planning. The Whole Farm Planning Team looked at the many planning "tools" and models in use by people who are doing farm planning everywhere.

The Team learned that something was missing in the approach most people were using to make whole farm plans. What was missing, with few exceptions, was discussion about the need to be goal-driven while planning. And only a few of the tools and models contained any instructions on goal setting. The Team believes that a person has to decide where he wants to end up before he plans how to get there. This is not to say that there is no printed information on goal setting. There are many publications on the subject, but they are not offered as a bridge to whole farm planning. The Team decided that such a bridge is needed and charged the Minnesota Project to produce it. By reading this booklet and completing the worksheet included, the Team and The Minnesota Project, believe that you will create goals that will guide and motivate you to produce a successful whole farm plan for your farm.

This booklet is a product of the Whole Farm Planning Team's thought and work. The Minnesota Project thanks them for their participation and all their efforts to develop useful whole farm planning tools.

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The Whole Farm Planning Team:

Barb Bakken, Farmer
Anna Barker, Wilder Forest
Roger Becker, University of Minnesota
Marybeth Block, MN Board of Water and Soil Resources
Bill Bryson, Farmer
Lowell Busman, MN Extension Service
Tom Coffield, Farmer
Wayne Edgerton, MN Department of Natural Resources
Les Everett, University of Minnesota
Larry Johnson, Larry L. Johnson and Associates
Loni Kemp, The Minnesota Project

John Lamb, The Minnesota Project
Richard Levins, University of Minnesota
Jill MacKenzie, The Minnesota Project
Wayne Monsen, MN Department of Agriculture
David Mulla, University of Minnesota
Helene Murray, MN Institute for Sustainable Agriculture
Dennis Neffendorf, USDA Natural Resource Conservation Service
Paul Rosenblatt, University of Minnesota
Brian Schultz, Farmer
Rick Vanden Huevel, CENEX/Land O' Lakes

What you will learn in this booklet:

- An easy process for setting goals
- Reasons to have goals
- Who should help set goals
- Completing a self-assessment work sheet
- Setting your goals



“It is difficult to succeed without goals and a plan of how to get there.”

—*Whole Farm Planning: Combining Family, Profit, and Environment*

Why set goals?

The quote above says it best. If you want to plan for the future of your farm, you need to have goals, a target or targets, to plan toward.

Goals give direction and vision to help guide your decisions.

Having goals is essential to get you where you want to go

Goals help establish where you're going, how you're going to get there and when you'll arrive. They help guide your life and the progress of your farming and family enterprises. Without goals, people react to what happens moment by moment and each reaction sets them off on new paths with uncertain ends. As life speeds up, more time is spent reacting instead of creating. Goals help determine where you want to go as you manage your resources to reach your goals. Goals must be attainable and realistic to be truly useful.



The farm is not just a piece of land, some crops and livestock, and a way to make a living. It is much more. For the purposes of goal setting, think of your farm as the land, landscape, family, hired help, jobs and projects, neighbors, and community that serves the farm. Review the following lists of questions to get you thinking about the importance of setting goals for your farm.



If you are working from goals you established in the past, ask yourself:

- Are they written goals?
- Who participated in writing the goals? Have you included everyone who has interest in the farm?
- What is your goal time-frame? One year? Ten years? A lifetime? Seven generations?
- How has setting goals affected your farming? Did you weigh decisions to make changes in your farming practices or enterprises against your goals?
- Are your goals fulfilling? Are you seeing results? Is your quality of life improving?

Quality of life is the measure of the shared value and satisfaction you, your family, and those connected to your farm and community attach to the various features of place, the environment, and working. It involves lots of things like health, family loyalty, feeling safe, feeling we are doing the right thing, good friends, feeling right with the Creator, living simply, and so on.

Even having freedom to take a vacation may be an important element defining your quality of life. If life is good, then this is one reason you've chosen to be in farming.

If you have no written goals or you can't really say whether your goals are in sight, then ask yourself:

- Is quality of life something you think about and plan around?
- Are you clear about what resources will be required to fulfill your future needs?
- Have you fully considered the impacts of your farming decisions on, family, community, and environment?
- Have you ever made written goals for your farm? Your family? Your enterprises?
- Have you and your family members discussed goals?
- Do other family members have goals and do you know what they are?
- Can you describe a future that would fulfill your hopes for your farm, family, and community?



Certainly you think about many things that offer satisfaction in addition to the “bottom line.” While essential, profit or return alone is not the only good thing in life. Be thinking about what some of these other satisfying pursuits are. Goals should be much broader than income expectations.



***Wealth** is not just cash income and property - It is all that you place a positive value on. It may include the value of a beautiful landscape and bountiful wildlife. Healthy soil is an asset too. You might measure wealth in time available. You have your own measure of wealth, and it may even include the value you place on relationships with people, goodwill. Your opinion about your quality of life could be a measure of your overall wealth. The level of your wealth might be one indicator of success toward reaching the goals you have set.*

Learning how you make decisions

Perhaps you'd always wanted to have a one ton Chevy truck so you decided to buy one.

- What drove that decision?
- Did you believe you needed what you wanted?
- Did you read about and compare different options?
- Did you talk to a neighbor?

For many people there is a discovery after the purchase that you may not have really weighed all the factors.

- Did you make one choice at the expense of another?
- Or, did you get in trouble with your family for not buying something they thought was needed?

Now think about how you make decisions:

- Do you weigh your decisions against any set goals?
- Will your decision get you closer to your set goals?

If not, how do you know where you're going is the right place to go?



Who can help? “The Core Group”

Most of us need help with goal setting. Goals should be shared by those affected by the actions you will take to get to your goals. Pull together a core group for planning. It could include:

- You, your spouse or partner and other family members involved with managing the farm.
- Your immediate and extended family, those who are affected by your goals.
- Others in your core group who may help you assess and interpret your unique situation if needed.

Each family member may have different ways of looking at the farm and community. Success with setting goals may depend on how well the core group works together as a team that trusts each other, listens to each other, and takes each other’s viewpoints seriously. The group should consider choosing a leader, someone who is good at organizing things so they’ll get done. The leader should also work to see that trust, fairness, and honesty are maintained within the core planning group as they work together to set goals.

Getting Started

- Get everyone involved.
- Have them read this booklet.
- Schedule a meeting to talk about it.

For the first meeting, you might plan an outing where you’ll all have some time to be together without the usual day-to-day distractions. Add a little structure to the planning process. Plan to meet regularly until you’ve completed your “Making Goals Happen” worksheets and come up with a written goal statement(s) that you all can agree on.



The core group members will have to ask some basic questions about life - their visions, values and beliefs, needs, resources, work, fun, and community. If you are not familiar with the defining terms, refer to the shaded boxes for help. For a warm-up, before you begin to write your self-assessment, read the thought provoking discussion questions in the box below:

- ~ What do we (I) really want in life?
- ~ What can we (I) do that will be most productive and worthwhile?
- ~ What are we (I) really trying to achieve through our use of time effort, money, and management skills?
- ~ When should we (I) be able to achieve these things?
- ~ What can we (I) do when really important things conflict with one another? *i.e.* How are the inevitable conflicts among things hoped for and dreamed about to be resolved?

Source: *Goals for Family and Business Financial Management, Part I: Overview and Self Assessment*, published in 1985 by the Nebraska Cooperative Extension Service (Gessaman and Prochaska-Cue, 1985)



Vision, values, and beliefs:

These are all related. They are what you and your family think are important and they commonly drive your actions. What you see in the future for your farm, what you want your quality of life to be like, how the landscape should look is your vision. It is shaped by your values and beliefs. For example, if you believe that adequate cash income for purchasing the things you need is something you value highly, then your vision for the future of your farm may be different than someone who values growing and preserving their own food and not spending the cash at the grocery store.



These are typical of the difficult and personal fundamental questions of living. And there are many more:

“Am I doing what I want/like to be doing?”

“Am I happy with my relationships?”

“Do I know my purpose in life?”
Whew!

“Do I have enough time to pursue all that I need and want to do?”



The Worksheet

After a few quick instructions, you will be ready to fill in the worksheet, “Making Goals Happen.” It will help you to dig into your core values to envision your ideal farm and lead you to write down your goals.

- 1 Fill out the worksheet, “Making Goals Happen,” on the next page. It is short and the questions should be easy for you to answer. Don’t struggle over answers. Have everyone in your core group fill out the worksheet in detail.
- 2 Allow plenty of time for this, but set a date when everyone one agrees it will be done.
- 3 If you want to look at other assessment tools and discussions about goal setting a few are listed in the other resources section on page 14.
- 4 As you answer question eight, your goal statements, think of them in terms of long- and short-term.

Try to be very specific by using words or benchmarks that will achieve measurable results, but don’t struggle over writing it down. A vague goal for example might be, “I want to be rich, have a lot of free time, and care about my community.” It would be more specific and measurable to say, “I want to have a safe farmstead, free time to go fishing, take family vacations, have a three-piece band, profitably grow the best apples, livestock, and edible beans in the county, and be an involved civic leader.” You need to be specific so you can measure progress and then deliberately revise your actions to reach goals.

- 5 After you’ve recorded your goal, list the steps you’ll need to make to accomplish the goal. Later you will check them off as accomplished.



MAKING GOALS HAPPEN

The following questions are designed to help you think about what you value and what you want. Your values and wants lead to your goals. You may wish to answer the questions with single words, brief phrases, or long statements. This is for you. Keep in mind that this worksheet will be used by you as you work to communicate to your core group what is important to you and understand what is important to them.

1. **Values/vision:** What do you like most about your farm? About your work? What would you like the farm to look like at the end of your stewardship?

List what qualities you value in yourself as a person. Describe what qualities you would like to have or would like to work toward.

2. **Resources/Wealth:** What things that you don't now have would you like to own?

How much money is enough for you?

Resource base: *The land, the water, the air, the people involved with the farm, and the potential of the landscape are all part of the resource base. Helpful neighbors, borrowed tools; and others who can share your labors may be a resource. Your purchasing power, your community of friends and contacts and your knowledge of what's important to your decisions are also part of your resource base.*

What would you like to leave behind?



3. **Relationships:** Describe your relationship with each of the other core planning group members.

What words describe the relationship you want?

If you could change these relationships to make them better, what would you change?

4. **Work time/Free time:** List your major work tasks and activities throughout the year. Arrange them by month. Remember to include non-work things you do for fun or in service to your community.

5. **Enterprises:** List your talents and skills. List the work tasks you do. Then, list the work tasks you would like to do, but someone else does them. List the things you create. Then circle all your favorite work tasks.

Enterprise:

Whether you grow grain or animals or process foods or offer a tourist attraction, your enterprises are all the efforts you work on to generate income in order to stay in business and on the farm.

Talent and Skills

Tasks you do

Tasks you want to do

Things you create



6. **Learning:** Fill in the blanks with as many examples as you can think of:

"If only I knew more about _____, I would be able to do _____.

7. **Community:** List what your community does for you - services and activities available.

List what you do for your community.

What do you like most about your community?

What other services would you like to see your community provide and how else might you support your community?



8. Considering **all of the above**, write a sentence or a few sentences that best describe what you would like the future to bring, that you feel committed to reaching, and with enthusiasm.

NOTES:



WHAT TO DO NEXT

SHARING AND CLARIFYING:

Now that you've completed the worksheet, you're ready to discuss your answers to the first seven questions with the rest of your core group. Now is the time to discuss each item from the work sheet round-robin style. Ask questions to help clarify each other's thoughts. Resist judging other's valued opinions or priorities. Use the time to get to know one another better. If you've chosen a leader, you may want that person to guide the discussion.

QUESTION 8: UNDERSTANDING THE GOALS OF YOUR CORE GROUP

When the group is ready to tackle question eight, you could write the goal statements out on poster paper so everyone can see them together. Make sure that everyone has reflected on their answer. You may want to schedule a separate meeting for this in case someone needs more time to work on their answer.

Have each person talk about their answer. Be helpful and encouraging. The following questions might be useful in understanding the goal and how a person feels about it:



- Is the goal realistic or reasonable?
- Can I (we) see how to get there?
- What will have to change and in what time frame to achieve the goal?
- Can I (we) list the action steps needed to achieve the goal?

Remember there are no wrong answers. As a group you are working to understand and clarify, to be of assistance to each member in putting forth his or her goals. A person may change the wording of his or her goal statements at any time.

Once the core group has discussed and clarified all of the goals from Question 8, check them to see if they are alike. If they are alike, combine them in words that are acceptable to each of those who share that goal. Shared goals and the remaining list of goals together are your collected goal statements.



Setting Priorities

Every one of these goal statements is important to the person who wrote it. Remember this as you work now as a group to put these goals in order of most importance to the group. To have the goal accepted by the group, a person may wish to modify their goal, or link it with another. The group or individual may wish to drop a goal if it is not shared by the group - this does not mean that the person who wrote it cannot continue to work for it, or that the core group has decided that the goal has no value. Quite the opposite. Having discussed this goal may help others to understand, and possibly help to achieve the goal - even if it is not the top priority of the group.

To help with the ordering you may try dividing the goals into two sets, long-term (5-10 years out) and short-term. Next, reorder or flag the statements according to what must be reached, what should be reached, and make special note of where people want to devote time, energy, and resources. Your task is to find group goals that the core group shares and wants to work toward.

At the end of the discussion of Question 8, you will have a sense of your shared goals and your ability and willingness to accomplish them. Now you will need to develop an action plan or road map. You may already have plans in mind or on paper for various parts of your farm operations. But just like the goal setting process seeks to have you set goals that take all aspects of your life and values into account, the best way to develop an action plan is to develop a **whole farm plan**.

To begin your whole farm plan, we recommend that you read an introduction to whole farm planning, "Whole Farm Planning: Combining Family, Profit, and Environment" (1998). It is available from the University of Minnesota Extension Service, publication BU-6985-S. Their phone number is 612/625-8173. Also, instructional workshops on whole farm planning may be available for you. Contact the author at The Minnesota Project (800) 366-4793 to find out if there are any workshops scheduled and who to call for more information.



Revising your actions to support your overall goals as you go

Things change. So you may have to change with them from time to time. Once your goals are in mind, you will tend to make decisions and take actions that continue to lead to your goals. Once your goals are specific, realistic, and manageable, then monitoring or observing the results of later decisions will be easier.

Monitoring and Feedback: *Feedback is the information you need and use in order to make the right decisions about the next and later actions. Monitoring is the way you get the information. Sometimes it seems like an unconscious effort. You count money, acres, possessions, and bugs, you feel the earth, you smell and use your powers of observation to monitor. You might also establish indicators of success/failure and monitor for them. Monitoring is an ongoing process.*

Set aside a specific time (for example, each month or year) when the core group will discuss and analyze the progress they are making toward achieving their goals. Talk about what you are observing as it relates to your goals and established action plans. You should also revisit your goals when there are major changes in the core group (for example, someone marries, a worker leaves).

Weak Link: *You know about limiting factors. That's when you run out of a main ingredient and you can't make any more bread or widgets. A weak link is a sign of something you probably need to know. Always be looking for the weak link. It could be any resource in the broadest sense. A weak link could even be a person's ability or attitude.*

Making and evaluating decisions: *When you decide to take an action, any action, that decision will make things happen. You can't stop that. Decisions will be affected by events and circumstances over which you have little control. But you can evaluate the expected results of decisions. Learn from evaluating your possible decisions.*



As a group, revisiting goals can be done over coffee, around the fire place, while on vacation, when you feel it's time, or any time, or any time where you won't be easily distracted from your task. As you go through your lists of observations, you'll naturally discover a need to add other action items to do. Assuming you will have a whole farm plan, you can adjust your action plan to support your goal statement as needed. Have fun and good luck with setting goals, developing plans and with your farming future.



Other Resources for help setting goals

The Cornerstones Model: Values-based Planning and Management. Jerry Aaker and Jennifer Shumaker. Heifer Project International, 1996. (800) 422-0474.

A wholistic approach to participatory planning and management. Many worksheets, a lot of discussion.

The Fifth Discipline Fieldbook. Peter M. Senge. Doubleday/Currency. 1990.

“Goals for Family and Business Financial Management, Part I: Overview and Self Assessment, Paul H. Gessaman, and Part II: Identifying Your Goals, Paul H. Gessaman and Kathy Prochaska-Cue. Nebraska Cooperative Extension Service, July 1985. Publications CC312 and CC313. (402) 472-1748.

Booklets for self-assessment and goal setting. Includes questionnaires and worksheets.

“Managing Our Farm Family Future, A Reference Manual to Assist Farm Families in Making Management Decisions. University of Minnesota Extension Service. Minnesota Extension Service, 1988. Publication AF-MI-3370. (651) 625-8173.

Chapter 5, Setting Farm and Family Goals, describes a process and contains three worksheets.

The Monitoring Toolbox. The Monitoring Team. Land Stewardship Project, 1998. LSP, P O Box 130, Lewiston, MN 55952, (507) 523-3366

Eight-topic toolbox has a topic, Monitoring quality of life, that provides a family process for discussing quality of life and then deciding whether or not you are making progress toward your goals.

Rut Buster: A Visual Goal Setting Book. Wayne and Connie Bureson. Sloping Acre Publishing Co., 1994. (406) 328-6808.

Contains useful questionnaires (rut buster test) and worksheets.

Whole Farm Planning: Combining Family, Profit, and Environment. Dr. David Mulla et al. University of MN Extension Service, 1998. Publication BU-6985-S. (612) 625-8173



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the
minnesota
project

1885 University Avenue West, Suite 315
St. Paul, MN 55104
(651) 645-6159
(651) 645-1262
Water007@gold.tc.umn.edu