

Y'S  
MEN  
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cl/Goal Setting Manual

# Workshop on Goal Setting

## Trainer's Manual

# Instructions for the use of the GOAL SETTING TRAINER'S MANUAL

This material is intended for use in providing training to Club, District, Regional and Area Officers. When the words "Club" or "Y's Men's Club" are used, the trainer should change to "District" or "Region" or "Area", whichever is appropriate for the training workshop.

The topics included in this material are: Objectives of a Y's Men's Club; Importance of establishing goals; Organisational and personal goals; Categories of objectives; Priorities; Usable objective statements. At the conclusion of the training session, each person will have a list of goals for his/her personal efforts as well as those of his/her organisation. Personal priorities will be established.

The material is divided in such a way that it may be used for a single two-hour training session or as four separate half-hour training sessions. Different people will take varying amounts of time for the exercises. The trainer can control the time to some degree by allowing more or less time for group participation in the discussion.

Instructions to the trainer are typed in bold and bracketed in parentheses ( ). All other words represent what the trainer should say. The trainer should change the spoken words so that they fit his/her "conversational" method of speaking. Everyone says things differently so the trainer should change the words to allow himself/herself to feel natural. Above all, the trainer should read the material a number of times to ensure familiarity during the presentation. The less "reading" the trainer does, the better the training.

In some cases, the examples may not be appropriate. The trainer will need to replace those examples with some from the area and culture concerned. The important point in the case of examples is the idea or concept, not the example itself.

For most effective training, the "trainee" must be an active participant, not just a passive listener. Therefore the exercises aim to make the trainee do something. If the training workshop is in the form of an "expert" lecturing to the trainees there will be much less gained (if the people stay awake). The main idea is for the trainees to be active and leave the workshop with something they can go home and do.

The following list includes equipment and materials the trainer should have. If anything is *not* going to be provided by the "host" organisation, the trainer should bring it with him/her.

- flip chart (large pad of paper, preferably on an easel or stand)
- coloured marking pens (different colours will provide variety and help keep interest)
- masking tape (the flip chart paper will be fastened to the wall to allow viewing during the training session)
- copies of figures 7, 8 and 10 (at least one for each person)
- enough paper for all participants to do the exercises

Figure 11

# GOAL SETTING

	MEMBERSHIP	EXTENSION	TOF	ASF	IBC	BF	TRAINING
	1	2	3	4	5	6	7
MEMBERSHIP	1						
EXTENSION	2	1					
TOF	3	1	1				
ASF	4		2	2			
IBC	5			4	5		
BF	6					3	
TRAINING	7						7

Totals

Membership	6
Extension	4
TOF	1
ASF	2
IBC	3
BF	0
Training	5

Priority

Membership
Training
Extension
IBC
ASF
TOF
BF

Before we get started on our discussion of "setting goals", I want you to tell me what you think are the objectives of a Y's Men's Club. (Trainer: As the people state their views of the Club objectives, list them on the large flip chart paper. Then put the papers on the wall so everyone can see them during the entire training session.)

One of the things that you must do — as elected or appointed officers and chairpersons — is to set your goals for your term of office. Too often, what we do in our jobs or in our private lives is to become really busy being busy — and when the year is over we then try to see what we've done. That's not right! We need to identify our objectives or goals first — and then start working.



Being busy without a goal is an easy thing to do. All our lives we've been taught to keep busy. But management and leadership should be based on results, not keeping busy. A successful manager is one who gets things done — not one who just tries hard and keeps busy.

What we need to do is to change our thinking from "activity oriented" to "results oriented". We need to do three things initially:

1. identify the direction our organisation should take;
2. set some priorities for the use of our time and resources; and
3. develop some ways to measure effectiveness.

Establishing goals can be difficult. The objective of the army is to defend the nation. The objective of a hospital is to ensure the good health of the people. We say the objective of the Y's Men is to serve the YMCA and the community. But these are not really objec-

tives but policies or interests. We need to be more *specific* than that if we're really going to get anything done. Only *specific* objectives have any significance if we're going to get results.

So, the objectives must be *specific* — identifying *what* is to be done and *when*. And the objectives should match the person or people that are expected to accomplish them — the skills, the experience and the authority.

With these comments as a starting point, I want you to do two things. Take a piece of paper and make two columns. In the first column, write the objectives that you want your Club to reach during your term of office. In the second column, write *your* objectives — the things that *you* want to accomplish all by yourself. Don't put your name on the paper because I want to collect them for more discussion later on. (Trainer: Give the people 5 to 10 minutes to do this.)

## IDENTIFYING CLUB OBJECTIVES

If we put all these objectives on the wall, we'd find that we could put them into four categories. Every one of you should have something that will fit into each category. A particular objective might be in a different category for different people — because your objectives are strongly influenced by the condition of your Club, as well as your personal characteristics (what kind of person you are).

I think we all come into an office with some ideas about new projects, new procedures, better ways of doing old things. Probably all of you (even if you didn't list them) have objectives that could be classified as innovative, creative. (Trainer: Write "INNOVATIVE" on the large paper - see Figure 1.)

Unless your Club is very unusual, you probably have problem solving objectives. (Trainer: Write "PROBLEM SOLVING" on the paper.) There are specific difficulties that the Club is having — and these difficulties need to be corrected.

All of you have objectives regarding routine operations — unless you have a brand new Club, or one that is so bad that nothing is operating satisfactorily. (Trainer: Write "ROUTINE" on the paper.)

And the last category is personal development. (Trainer: Write "PERSONAL DEVELOPMENT" on the paper.) If your Club members are going to be of much help to you this year — and the Club is going to have leadership in the future — you should have some goals regarding personal development.

Some of your objectives may fit into more than one category. Some years ago, one Region had a very serious problem. There wasn't anybody for Regional Director. All the qualified people refused. Development of capable leadership was a problem solving objective and a personal development objective.

On your paper with your Club and personal objectives, write "I", "PS", "R" or "PD" beside each objective, indicating which of these categories the objective is in. (Trainer: On the large paper, write "I" beside "INNOVATIVE", "PS" beside "PROBLEM SOLVING", "R" beside "ROUTINE" and "PD" beside "PERSONAL DEVELOPMENT".)

Now I have a question that only you, as an individual, can answer. How much of your time do you think should be spent on each category? What percentage of your time should be spent on "routine" objectives? This, of course, depends on your office. The Club Secretary must do many routine things regarding meeting minutes, attendance records and correspondence — this might be 50% or more. The chairperson for youth activities might be very innovative — new projects, new methods of doing traditional projects — maybe 80% could be "innovative".

Without looking at your objectives, write on another piece of paper the percentage of your time that you think you should spend on each of these four categories. Remember, the four percentages must add up to 100%. (Trainer: Give the people two or three minutes to do this.)

----- end of first 1/2 hour -----

Whatever categories you put your objectives in — or even if you don't put them in categories — you must set some kind of priorities. You must determine which objectives are most important — where you need to spend your limited time and energy and that of the other Club officers. You need to identify the "must do's", the "should do's" and the "nice to do's".



(Trainer: Write "MUST DO", "SHOULD DO" and "NICE TO DO" on the large paper and put it on the wall. This paper should now look like Figure 2.)

The first group includes those things that are necessary to justify your existence. Why are there Club officers and chairpersons? Why does your Club bother to elect you? The answers are the "must do's". The second group includes all of those things that are necessary for growth, but their absence doesn't mean the death of the Club. The last group includes those things that can be postponed until you find some extra time.

Now all of you might have the same objective listed, but its importance or priority will depend upon the condition of your Club. For example, most of you probably have "membership increase" on your list of goals. If your Club has been a "dying" Club, this would certainly be in the "must do" category. If, however, you have a large Club, you might decide to concentrate on expanding the types of services provided, with only a routine emphasis on membership.

Now look at your paper with the two lists of objectives: the Club's and yours. With each list, I want you to establish priority. If your Club could do just one of those things, which one would you want? I realize that many times the goals will be related but, for our purposes here, ignore the relationship and put a "1" by the most important, a "2" by the second most important and so on, until every objective has a number. Then do the same numbering with the list of your personal

	MEMBERSHIP	EXTENSION	TOF	ASF	IBC	BF	TRAINING
MEMBERSHIP	1	2	3	1	5	1	1
EXTENSION	2		2	2	2	2	2
TOF	3			3	5	3	3
ASF	4				5	6	7
IBC	5					5	5
BF	6						7
TRAINING	7						

Totals

Membership	3
Extension	6
TOF	4
ASF	0
IBC	5
BF	1
Training	2

Priority

Extension
IBC
TOF
Membership
Training
BF
ASF

Figure 9

		MEMBERSHIP	EXTENSION	TOF	ASF	IBC	BF	TRAINING
	1	2	3	4	5	6	7	
MEMBERSHIP	1	A	B	C	D	E	F	
EXTENSION	2							
TOF	3							
ASF	4							
IBC	5							
BF	6							
TRAINING	7							

goals. Once they all have numbers, put them on another sheet of paper in the proper order (#1 first). Then I want you to give me the first sheet of paper. (Trainer: Give the trainees time to establish priorities, but no more than five minutes. Then collect the first lists.)

### WRITING OBJECTIVE STATEMENTS

Now, what you have written are most likely *not* objective statements. You have identified the objectives, but have not written objective statements. We need to put those objectives into a form that will let you use them as effective management tools. And we'll look at nine rules or guidelines.

1. The first rule is that the objective statement should begin with the word "to" and be followed by an action verb. (Trainer: On large paper, write "TO .... (ACTION). See Figure 3.) This indicates that we're going to *do* something - some action is going to be taken. Some examples are: "to increase", "to provide", "to produce", "to revise".
2. The objective statement specifies a *single* key result to be accomplished. (Trainer: On large paper, write "SINGLE RESULT".) This key result is identified specifically by description or by a measurement system. There must be some method by which you will eventually know *when* and *if* the objective is attained, for example, "to set up the Christmas tree lot". Another example might be "to increase membership by 10%" — with 10% as the signal of success.
3. The third rule is that there should be a target date for accomplishment. With most of our objectives, the target date might be "by the end of my term of office". But often we might want accomplishment by mid-year, or even next month. (Trainer: Write "TARGET



DATE" on the large paper.) Everybody should know just *when* the objective is to be attained.

4. The objective statement specifies what and when, but not *how*. (Trainer: On the large paper, write "NOT HOW".) At this time, we do not want to specify "how" something will be done. Later, when we start thinking about "how", we'll want to look at the many ways that something can be done — and *then* pick the best way, the "how".
5. The objective statement must relate directly to the person's or Club's roles and missions — and perhaps to the objectives of higher authorities. (Trainer: On the paper, write "MY JOB".) It's amazing how often we find ourselves spending a large percentage of our time doing things that *other* people should be doing - and not getting *our* jobs done.
6. The objective statement must be readily *understandable* by those people who will be working on it. (Trainer: Write on the paper, "UNDERSTANDABLE".) This sounds so logical that you can't believe it needs saying — and that's usually correct. But if we have an Area Service Director with the objective "to improve Y's Men's knowledge of other nations", I don't think he needs to send out foreign language books. It's not just "knowledge" we need to improve — it's *understanding*. Knowing how to speak Korean is not enough to make me understand Korean culture. So what do we really mean by "to improve knowledge"?
7. The objective itself must be *realistic* and *attainable*. (Trainer: Write "REALISTIC" on the paper.) Quite often people say, "The objective should provide a challenge" — require a significance amount of effort. But this is really nonsense! The objective should be what is *needed*, where you want to *be*. You don't want to make the objective harder just to make it a challenge, just to make people work hard. If you can get where you want to be, *easily*, that's terrific. Then you can start working on something else.

8. The objective should be (willingly) agreed to by all people involved, especially those people who will be responsible for doing the work. (Trainer: On the paper, write "AGREED UPON".) Nothing makes an objective more difficult than people who either don't care or actively oppose it. So while you may be the person who *first* writes the objective statement, you will need to discuss it with people and get their agreement — or change the objective. The objective is not developed by just one person — it's the product of group thinking.
9. And finally, the objective is recorded in writing, with copies to all persons. (Trainer: On the paper, write "RECORDED".) And these copies are periodically reviewed for continued relevance and agreement.

Now we have proper objective statements. But writing a proper objective statement doesn't get anything done. It's the first step — but it's *only* a step. The next step, with the



other Club officers or board of directors, is to develop programmes to accomplish the objectives. In many cases, you as officer or chairperson will not be doing the actual work. You'll be delegating the jobs to other officers, co-chairpersons or Y's Men. They will be the ones who plan and carry out the programmes. In effect then, the programmes to reach the Club objectives become the objectives of the members. Which means that *they* must then develop objective statements, just like you have done. This process of objective-to-programme-to-objective can proceed from the International level all the way to the committee chairperson of an individual Y's Men's Club — or to an individual Y's Man.

(Trainer: Fasten the paper to the wall. The paper should look like Figure 3.)

### REWRITING OBJECTIVE STATEMENTS

Let's look at some of these objectives that you listed on the first piece of paper. (Trainer: Go through the first lists of objectives that you collected from the trainees and pick out four or five that are most common. These will probably be things like "increase membership", "charter new Clubs", "emphasize Time of Fast" and "more Brother Clubs".)

Here's one that almost everyone seems to be concerned about — membership. More than one person wrote "increase membership". How would we rewrite this to include these nine characteristics on the flip chart paper?

(Trainer: Lead discussion to where statement is something like "To increase membership by five persons in each Club by next April". Write it on the large paper.)

1. With this statement, we show *action* — "to increase".
2. We have a single result — we have not combined two efforts.
3. The target date is "next April".
4. We have not said "how" — the Clubs might use any number of methods.
5. It is the members' responsibility to increase membership.
6. Everybody can understand it.
7. Is a five-member increase "realistic"? — only *you* know if your Clubs can do this.
8. The big question is: Will the members *truly* agree with this? Will each Y's Man *really* try?
9. Finally, the objective must be recorded, included in Club meeting minutes or published in the Club bulletin, so that everybody knows it.

————— end of second ½ hour —————

	MEMBERSHIP	EXTENSION	TOF	ASF	IBC	BF	TRAINING
	1	2	3	4	5	6	7
MEMBERSHIP	1						
EXTENSION		2					
TOF			3				
ASF				4			
IBC					5		
BF						6	
TRAINING							7



other six objectives and inserting the number of the more important objective in boxes A through F of Figure 9.)

Now I want you to go through this process again, this time comparing "Extension" with the other five objectives and putting the numbers in the boxes in the second row. Continue with these comparisons until you have a number in every box. (Trainer: Give trainees enough time to complete their priority boxes.)



----- end of third 1/2 hour -----

Here's a possible example. (Trainer: Either show Figure 10 on the large paper or give people copies.) This represents a Club which had a large membership increase last year. The Club is very active in providing service to its YMCA and community, but not much involved in International projects. In the first row, we can see that the officers place greater emphasis on chartering Clubs and participating in TOF and Brother Clubs than on Membership. The second row shows that the officers think that Extension is more important than the service areas.

Upon completion of the rows, we add up the number of times that each objective was preferred. (Trainer: Look through the boxes and count how many times "1" was entered, how many times "2" was entered, etc. Add

totals as shown on Figure 10.) The priority ranking of the objectives is shown by the number of times each objective number is in a box. This particular Club will have a priority ranking of: 1) Extension; 2) Brother Clubs; 3) Time of Fast; 4) Membership; 5) Leadership Training; 6) Brotherhood Fund; and 7) Alexander Scholarship Fund. (Trainer: Put this priority ranking on the large paper as shown in Figure 10.)

Here's another possible set of priorities. (Trainer: Show Figure 11.) This is for a Club that has been gradually losing members. The average age of members has been increasing. These older members participate very much in International projects, giving a lot of financial support, but decreasing hours of actual work.

This priority ranking is quite different - "Membership" is #1 instead of #4; "Leadership Training" is #2 instead of #5. While "Extension" was #1 in the first example, with this Club it's #3.

So you can see that, with the same set of objectives, the priority depends upon the situation at hand and also upon the feelings or opinions of the person making the priority ranking. In any case, the Club leadership now has a clear picture of where the greatest effort should be made.

Here is a blank form. (Trainer: Give copies of Figure 7.) Put *your* objectives in here. If you don't have seven of them, put in whatever you have - any number will work. When you have time - and it may take quite a bit of time and discussion - establish priorities for *your* efforts this coming year.

Figure 6

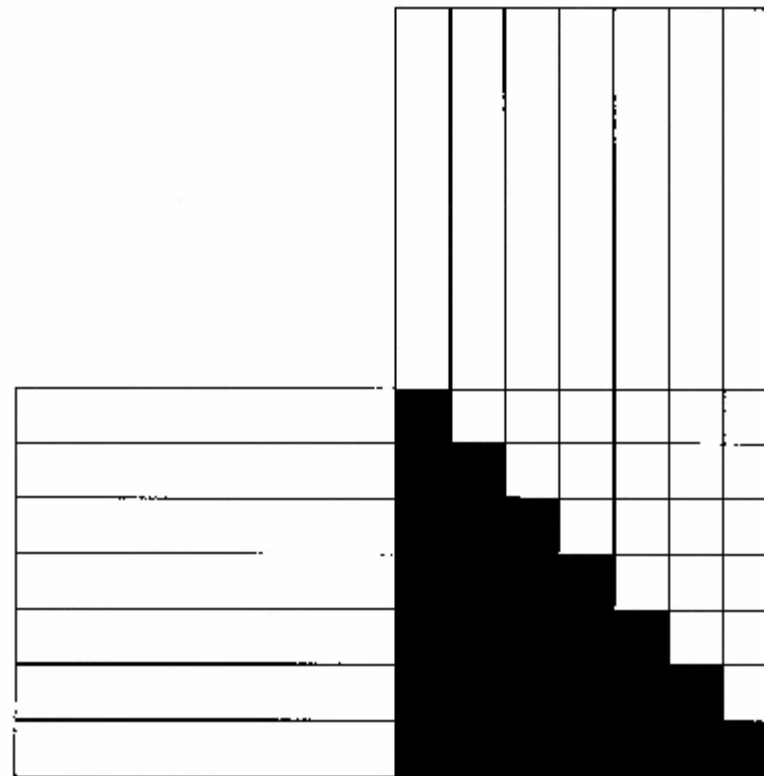


Figure 4

MEMBERSHIP
EXTENSION
TOF
ASF
IBC
BF
TRAINING

Figure 1

- INNOVATIVE
- PROBLEM SOLVING
- ROUTING
- PERSONAL DEVELOPMENT

Figure 2

- MUST DO
- SHOULD DO
- NICE TO DO

Figure 3

1. TO . . . . . (ACTION)
2. SINGLE RESULT
3. TARGET DATE
4. NOT "HOW"
5. MY JOB
6. UNDERSTANDABLE
7. REALISTIC
8. AGREED UPON
9. RECORDED

Figure 5

	MEMBERSHIP	EXTENSION	TOF	ASF	IBC	BF	TRAINING
MEMBERSHIP							
EXTENSION							
TOF							
ASF							
IBC							
BF							
TRAINING							