

Goals Worksheet

Determining your long-term goals seem overwhelming, however completing the following tasks will help you to identify your goals.

STEP 1:

Long-Term Goals (5-year goals) – Your long-term goals should paint a picture of where you would like to be in 5 years. Typical domains include work, relationships, financial, geographic, personal growth, and/or enjoyable activities (e.g., vacations, travel, etc.)

Answer the following questions:

In five years, what kind of life do I want?

(note: think of (1) where you'd like to live, (2) the type of work that you'd like to do, (3) the type of income that you'd reasonably like to have, and (4) the type of relationships that you'd like to be in):

Wouldn't it be cool if, in 5 years, I was able to:

STEP 2:

Now we need to take the information above and reformulate it into specific goal statements. Goals are best formulated by following the SMARTS acronym:

Specific – the goal needs to be clearly stated – what is the outcome that you’d like to achieve?

Measurable – goals that are quantifiable are the easiest to assess. How will you know if you are making progress toward the goal?

Attainable – the goal needs to be something that you can achieve.

Relevant – the goal needs to be associated with a specific set of knowledge and skills that you can obtain/develop.

Time-bound – there needs to be a period within which you hope to achieve the goal.

Self-determined – the goal has to be driven by you it can’t be a goal created for you by others.

Examples:

- *In five years, I will be employed as a high school math teacher.*
- *In five years, I will have saved half of the money needed for a house down payment based on a home value of \$200,000 which is \$20,000.*
- *In five years, I will be married to my girlfriend.*

Write down 4-5 long-term goals from the list generated in Step 1.

1. _____

2. _____

3. _____

4. _____

5. _____

STEP 3:

For each of the long-term goals that you've identified in Step 2, think about the short-term goals that you would need to achieve so that you can achieve your long-term goal (see example below).

| Long-term goal | Yr. 1 short-term goal (s) | Yr. 2 short-term goal(s) | Yr. 3 short-term goal(s) | Yr. 4 short-term goal(s) |
|--|--|--|---|---|
| <i>In five years, I'd like to have half of a house down payment (\$20,000)</i> | <i>1. succeed in school by obtaining grades of C or higher in my classes. 2. put a minimum of \$20 into my savings account each month 3. get a full-time job for the summer break.</i> | <i>1. succeed in school by obtaining grades of C or higher in my classes. 2. put a minimum of \$20 into my savings account each month 3. get a full-time job for the summer break. 4. participate in a professor's research lab.</i> | <i>1. succeed in school by obtaining grades of C or higher in my classes. 2. put a minimum of \$20 into my savings account each month 3. graduate at the end of the spring semester! 4. begin applying for full-time jobs in March. 5. obtain full-time employment by June.</i> | <i>1. save 20% of my full-time work income.</i> |
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| Long-term goal | Yr. 1 short-term goal (s) | Yr. 2 short-term goal(s) | Yr. 3 short-term goal(s) | Yr. 4 short-term goal(s) |
|----------------|---------------------------|--------------------------|--------------------------|--------------------------|
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STEP 4:

When we establish goals, we typically have to identify a number of habits that we need to create/engage in. For example, if a goal was: *To lose five pounds within six months*. You would most likely need to create some habitual behavior around health such as: *exercising 6 days per week, eating a low-fat diet, discontinue eating sugary snacks/desserts*.

For each of the short-term goals identified in year one in the Step 3 Table, identify a minimum of three habits per goal. If you are having difficulty developing habits, please complete the HABIT PLAN worksheet.

| Short-term Goal | Habits (3 minimum) |
|---|--|
| 1. <i>succeed in school by obtaining grades of C or higher in my classes.</i> | 1. <i>Develop a weekly schedule</i> 2. <i>Use campus and other resources when struggling with a class (e.g., tutoring, khan academy videos, etc.).</i> 3. <i>Use professor's office hours to get answers to questions.</i> 4. <i>Join study groups.</i> |
| 2. <i>put a minimum of \$20 into my savings account each month</i> | 1. <i>create a weekly/monthly budget</i> 2. <i>put change in a "savings jar"</i> 3. <i>at the end of each month deposit savings jar content into savings account (add additional money if not totaling \$20).</i> |
| 3. <i>get a full-time job for the summer break</i> | 1. <i>each week spend 30 minutes looking for jobs beginning one month from the end of school.</i> 2. <i>schedule regular meetings with my career center counselor to help me to create and update my resume.</i> 3. <i>beginning one month before the end of school, apply for any jobs that are found in my search.</i> |
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STEP 5: THE FINAL STEP!!

One of the things that undermines our success in completing goals is when unexpected obstacles interfere with our ability to meet a goal. In the final step of the goal development process, for each of the year one short-term goals that you identified, think of one to three things that could go wrong or interfere with your goal success, write them down and then note what you will do to handle the obstacle.

| Short-term Goal | Obstacle | Solution |
|---|--|--|
| <i>1. succeed in school by obtaining grades of C or higher in my classes.</i> | <i>I fail a class.</i> | <i>Re-take the class during the winter or summer breaks. Speak to my academic advisor regarding options.</i> |
| <i>2. put a minimum of \$20 into my savings account each month</i> | <i>I don't have enough money to save after an unexpected expense arises.</i> | <i>Redo my monthly budget and try to account for the lost savings a little at a time over the next few months.</i> |
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One final thought: Each year, you will need to re-do steps 4 and 5 so that you are prepared for the upcoming year.