

EXERCISE SIX: YOUR FAMILY GOALS

SUPPLIES:

- Your family
- Family Goals Worksheet or paper—one sheet per person
- Something to write with—one per person
- Optional: computer to type up a spreadsheet

OBJECTIVE:

The objective of this exercise is to set goals as a family, modeling the process of setting individual goals for your kids.

THIS EXERCISE HAS SIX STEPS:

1. Set individual big goals.
2. Decide on categories.
3. Generate ideas.
4. Consolidate ideas and make them S.M.A.R.T.
5. Set up spreadsheet and track.
6. Evaluate and readjust.

STEP ONE: SET INDIVIDUAL BIG GOALS.

Work with each family member to come up with two big personal goals. Pick one goal that is hard and one goal that is fun. These are big goals that each person is committed to working toward over a longer period of time—six months to a year.

STEP TWO: DECIDE ON CATEGORIES.

We used the categories from GoBundance since we are familiar with them, but you can use any categories you see fit for your family. If you'd like to borrow our categories, here they are again: Healthy Habits, Authentic Relationships, Making Memories, Honoring Commitments, Genuine Contribution, and Financial Literacy. You could also use your family values as the categories for setting your goals.

STEP THREE: GENERATE IDEAS.

Go through each of the categories you've set and come up with as many goal ideas as you can for each. Remember, the idea here is to generate lots of ideas. Don't edit them now; that will come in the next step.

STEP FOUR: CONSOLIDATE IDEAS AND MAKE THEM S.M.A.R.T.

This is the time to pare the goal ideas down, decide what's most important, and make the goals specific, measurable, achievable, relevant, and time-bound. To help with this step, you can ask the following questions: What would *done* look like? How much can we realistically fit in this year, month, week? Does this goal line up with our values? For each goal category, set one to five goals.

STEP FIVE: SET UP A SPREADSHEET AND TRACK.

This step is optional, but we have found it is the easiest way for us to stay consistent with tracking. I prefer to make two Google Sheets. The first is like you saw above, which has the bottom-line goals with totals and percent complete. The other is a tracking sheet with more specifics.

For example, we have a goal to read ten books as a family this year. On the first sheet, it just lists the goal, actual, and percentage. On the second sheet, there would be a place for book title, date finished, and a place to total the number of books read. I would then copy and paste the total from the second sheet to the first sheet in the "actual" column. That way, it will auto-populate that spot when I update the tracking sheet.

STEP SIX: EVALUATE AND READJUST.

You may want to do this quarterly or mid-year. Take a look at your numbers and see if there are any goals that aren't S.M.A.R.T. There are many reasons a goal might be off track. Maybe it wasn't aligned with your values, maybe it was an ideal but not realistic in practice, maybe someone in the family got sick, and their health became the top priority in the family. This is not a time to point fingers and blame, but a time to take a hard look at the goals and readjust to make them more doable. There's no shame in taking a goal off the list or readjusting to a lower number to make it achievable.

FAMILY GOALS WORKSHEET

STEP ONE: SET INDIVIDUAL BIG GOALS.

Work with each family member to come up with two big personal goals. Pick one goal that is hard and one goal that is fun. These are big goals that each person is committed to working toward over a longer period of time—six months to one year.

My Big HARD Goal for the year is to: _____

My Big FUN Goal for the year is to: _____

STEP TWO: DECIDE ON CATEGORIES.

What are the categories that are most important for your family to set goals in?

STEP THREE: GENERATE IDEAS.

Go through each of the categories you've set and come up with as many goal ideas as you can for each.

STEP FOUR: CONSOLIDATE IDEAS AND MAKE THEM S.M.A.R.T.

This is the time to pare the goal ideas down, decide what's most important, and make the goals specific, measurable, achievable, relevant, and time-bound. For each goal category, set one to five goals.
