

Create A Holistic Goal

By: Atina Diffley - *Quality Of Life: Tools And Systems For A Healthy Farming Partnership*

Goals! Have you ever tried unsuccessfully to move something heavy with another person, only to discover that the two of you have been pulling in different directions? Challenging, to say the least.

In a partnership it is critical that all the stakeholders are working toward the same goal, and that the goal accommodates the needs and values of all stakeholders. Hence, a comprehensive written goal is a powerful instrument for building understanding and cooperation, and focusing direction for your partnership(s). It guides decision-making criteria and strategies to lead us toward the lives we want.

A Few Helpful Definitions

- **A goal** is a desired result we work toward. It provides a “compass” to remind us of our “true north.”
- **Big goals** generally affect multiple people and are long term. Big goals should receive extensive planning and evaluation with all stakeholders’ input, and accommodate all stakeholders’ values and needs.
- **Small goals** generally don’t affect many people, or have a long term. They should be managed to not consume too much time, energy, and money and are generally best decided by the people they affect.
- A **mutual goal** requires agreement from all parties.
- **A strategy** is a plan of action designed to achieve a goal.
- **A task** is one step in the plan of action to accomplish a goal. Usually there are multiple tasks in a strategy.
- **Criteria** are principles or standards by which something may be evaluated or decided.

An example from my own life: Our mutual goal was initially focused on creating an economically viable farm and owning farmland. The primary criteria we set were based on economic stability. Our strategy to accomplish our mutual goal was to expand production and sales to raise our gross income, and to mechanize tasks to lower our cost of production and increase profit. We planned who would be in charge of which tasks to implement our strategy.¹ Martin was responsible for equipment acquisition, operation, and maintenance. I took care of marketing and finances. We shared crop planning. We agreed that decisions that affected our big goals would be made together; and the person in charge of an area would make the everyday, small decisions. Our farm became larger. Everything moved faster. We made money! Profit! And relatively quickly! We were an effective machine!

However, we soon discovered the unintended consequence that our farm was no longer a friendly and safe place for our kids to be part of. Having the kids involved was always an important value for us, but we hadn’t consciously incorporated it into our goal and decision making process. If we had, we would have created a different farm. We realized, and then decided that we had to create and implement a **holistic goal** that addressed our personal needs and values, or burn out.

A “holistic goal” is a three-part goal from a school of thought called Holistic Management. It describes:

1. **Quality of Life:** What we really want our lives to be.
2. **Forms of Production:** What we must commit to in order to produce the quality of life we want.
3. **Resource Base:** Our ideal farm-- the future resource base the forms of production depend on.

¹ See, Roles and Responsibilities: “Who” Is Responsible For “What.” atinadiffley.com/quality-of-life

The three parts are all critical to a comprehensive holistic goal that can guide our decisions and actions toward the lives we want. Without the broad base of a holistic goal, we may well accomplish a goal we've stated, but with unintended consequences.

When Martin and I brought the holistic goal and decision making process into our lives and farm decisions it led us to strategies that included our personal needs and values. We improved our employee management and delegation skills, and made crop changes. We carved out areas of responsibility that our kids were excited to take on and grow with based on their needs and values. They became stakeholders in the farm. We set work schedules for ourselves and stopped working 24/7 as if we were machines. Our kids engaged with the farm work and life, and we designated time away from the farm for personal time and together as a family.

A holistic goal provides us with the knowledge and framework to support the four critical management steps of plan, monitor, control, and replan.

1. We know the direction to go (plan);
2. We have a criteria to measure our progress (monitor);
3. We can correct our course when things go wrong (control);
4. We reevaluate and redirect as our lives, markets, or needs change, and when big things go wrong (replan).

It's important to work with a holistic goal as a living document.

Things change. Goal setting is often a process of discovery. We need to reevaluate and revise routinely to stay current. Whether we already know what we want or not, we will likely change along the way. The how-to accomplish our goals also needs regular review. Sometimes our goals stay the same, and the best strategy to achieve them changes.

Martin and I established an annual process to reevaluate our holistic goal each winter. A time-out from the hectic business of farming and family, we created a snapshot of where we were in the moment, reevaluated what we wanted our lives to be, and asked what changes would be needed to accomplish what we wanted.

One year our annual reevaluation process resulted in the decision to buy a refrigerated delivery truck. To others it looked like we bought the truck for cold chain management. But that's not what the decision was driven by. We were already meeting cold chain needs: we cooled at harvest, loading the cooled produce into insulated trucks at 3 am, covered it with insulating blankets, and delivered in the early morning hours before the heat of the day. But we weren't accomplishing our quality of life goals with a schedule like that! Plus, the marital disputes at 3 am on the loading dock kept the kids from wanting to be part of that process! The refrigerated truck allowed us to load cooled produce at the end of the pack day before delivery, turn on the compressor to keep it cold, hire a delivery driver and sleep until 6 am. Our quality of life instantly improved.

Schedule it.

There is no convenient prewritten map that will take us where we want to go. Our holistic goal is the compass holding us to our true North. Our strategies are the map that we create. The reality for most farms is that creating a holistic goal is an urgent and important task. It should be done as soon as possible and maintained as a basis for effective decision-making and successful management. The most challenging aspect of creating a written holistic goal is starting. Schedule a time to do it that works for you. It could be 2-3 hours as a "date night" to work on it off the farm, or 1-2 hours at the start of the workday over the course of a week. Make a plan to start on the work and continue doing so, despite the temptation to tackle other tasks.

Creating Your Holistic Goal

Your holistic goal will work to the extent that the participants buy into it. This means that:

- All the decision-makers or stakeholders need to participate in setting the goal.
- Keep adjusting the goal until it matches what everyone wants. The objective is to create “buy-in” for the process AND the outcomes. Participants should consider this holistic goal “theirs”. The process will take more than one session. Review the tools included here and decide on an individual or group process. If you are including employees in the process you may consider when you’d like them to complete the exercises.
- As trust grows, and people discover what they truly need and value, the goal may change with time. Plan to adjust the goal as the needs, enthusiasm and priorities of participants change.

Stakeholders: Primary and Secondary

- **Primary stakeholders** are the people who are most affected by a decision. They are generally the primary decision makers.
- **Secondary stakeholders** are affected by the decision but might not make the final decision or have the same weight on the final decision. It can be important to understand their criteria, and include them in strategic planning.

Goal Writing Tips

(From Rockin’ the Holistic World with Daniela Ibarra-Howell & Rio de lu Vista 8/15/96)

- Write it down!
- State 100% what you want. Do not include what you don’t want.
- Tasks and strategies—the how to get it—are not included in your goal. The best way to get what you want may change over time. People argue far more over how to achieve goals than what those goals should be.
- Be specific. What will you see, hear, and feel? What will you be doing? What will others notice?
- Keep it positive, no problems (unless you want problems).
- Involve everyone who is affected by the decision-making.
- Build your holistic goal around your quality of life needs and values.

1st Step: Define the Whole Under Management.

This template captures who should be involved in your goal setting process, the “stakeholders,” and the “resources” you have to work with at this point in time. This is also useful information to collect at the start of your annual review and redirection process.

-- Holistic Management: A New Framework for Decision Making, Allan Savory with Jody Butterfield

In the form below, answer: Where am I today? What point am I starting from?

People: Who are the primary decision makers? Primary Stakeholders
Resources: What am I working with?
People:
Land:
Animals:
Equipment:
Community:
Capital: What is the capital (money) at your disposal? What overhead are you supporting? What debts are you carrying?

A Process For Writing Your Holistic Goal: Private and Collaborative Processes

1. Private Process: First, each person completes a private process of defining his or her own goal.
2. Collaborative Process: Then, with respect and understanding, everybody comes together and make a mutually agreed upon goal as a group.

2nd Step: The Private Process

Preliminary Exercises

Before working as a group, each stakeholder works individually on articulating his or her own Personal Holistic Goals. Exercises 1 to 4 will provide you with a process to define your deepest personal values.

- It's OK to skip an exercise that doesn't work for you.
- Do this process without interruptions or distractions.
- It can be helpful to do this individual work as a group. One person can guide the group through the steps. If so, hold group discussion until everyone has defined their own private holistic goal.

Personal Values Exercises

Exercise #1

"In your mind's eye, see yourself going to the funeral of a loved one. Picture yourself driving to the funeral parlour or chapel, parking the car, and getting out. As you walk inside the building, you notice the flowers, the soft organ music. You see the faces of friends and family you pass along the way. You feel the shared sorrow of losing, the joy of having known, that radiates from the hearts of the people there.

As you walk down to the front of the room and look inside the casket, you suddenly come face to face with yourself. This is your funeral, three years from today. All these people have come to honor you, to express feelings of love and appreciation for your life.

As you take a seat and wait for the services to begin, you look at the program in your hand. There are to be four speakers. The first is from your family, immediate and also extended – children, brothers, sisters, nephews, nieces, aunts, uncles, cousins, and grandparents who have come from all over the country to attend. The second speaker is one of your friends, someone who can give a sense of what you were as a person. The third speaker is from your work or profession. And the fourth is from your church or some community organization where you've been involved in service.

Now think deeply. What would you like each of these speakers to say about you and your life? What kind of husband, wife, father, or mother would you like their words to reflect? What kind of son or daughter or cousin? What kind of friend? What kind of working associate?

What character traits would you like them to have seen in you? What contributions, what achievements would you want them to remember? Look carefully at the people around you. What difference would you like to have made in their lives?

-- From 'The 7 Habits of Highly Effective People' by Stephen R. Covey

Exercise #1 Worksheet

Take a few minutes to jot down your impressions.

<i>Family</i>	<i>Friends</i>	<i>Work</i>	<i>Community</i>

Exercise #2 – Self-Care: Physical, Mental, Spiritual, Social-Emotional, And Personal Fulfillment Needs

Personal health includes our physical, mental, spiritual, social-emotional, and personal fulfillment needs.

It is important to plan ahead for self-care. Self-care often receives only the time and energy that is left over after the work is done. Which, since the work is never done on a farm—might be none.

The purpose of this exercise is to evaluate:

1. How well you are presently meeting your personal needs in each of these self-care areas and;
2. Articulate goals you would like to work toward in each of these self-care areas.

Realistically, it is hard to carve out “away-time” for self-care. Incorporating self-care into work and relationship structures can increase your ability to meet them. For example, my spiritual health needs are often met through my work on the farm—taking a few minutes to notice that I am immersed and engaged with the life process. Other people may need to designate away from the farm time to attend a service or other activity. My physical health self-care needs to be deliberate. I take a minute to do counter-motion stretching every 30 minutes when I am doing a repetitive-motion task. I do resistance training at a gym three times a week. When I don’t do this self-care, my physical wellness suffers and pulls down the rest of my personal health areas.²

² To explore meeting personal needs deeper, see, *Plan Ahead to Meet Your Personal Needs* www.atinadiffley.com/quality-of-life

Exercise #2 – Self-Care Worksheet

1. On line 1, based on what you want for yourself, indicate where you presently fall on the scale of self-care for each area.
2. On line 2, write your personal goal for this area.

	Physical Health	Body health care through nutrition and exercise	
1	Not Enough (Ineffective)	Just Right (Effective)	Too Much (Ineffective)
2	Personal Physical Health Goal:		

	Mental Health	Reading, writing and taking time to think	
1	Not Enough (Ineffective)	Just Right (Effective)	Too Much (Ineffective)
2	Personal Mental Health Goal:		

	Spiritual Health	Reading inspirational literature, meditating, time in nature.	
1	Not Enough (Ineffective)	Just Right (Effective)	Too Much (Ineffective)
2	Personal Spiritual Health Goal:		

	Social-Emotional Health	Regular attention to key relationships with others.	
1	Not Enough (Ineffective)	Just Right (Effective)	Too Much (Ineffective)
2	Personal Social-Emotional Health Goal:		

	Personal Fulfilment Health	Achievement and fulfilment	
1	Not Enough (Ineffective)	Just Right (Effective)	Too Much (Ineffective)
2	Personal Excellence Health Goal:		

Exercise #3

From the work of Don and Bev Campbell (<http://holisticmanagement.org/directory/name/don-campbell/>)

1. In column "A" give each value a 0-5 ranking based on how much you personally value it in your life. (0 = don't value, 5 = highly value)
2. In column "B" give each value a 0-5 ranking based on how bad it would be if that value were almost nonexistent in your life. (5 = very bad, 0 = not a big deal)
3. Now give each value a 0-5 ranking based on how great it would be if that value were dramatically increased in your life, write it in column "C". (5= incredibly good, 0 = not a big deal)
4. In column "D" total the values in columns "B" and "C" for each entry (don't include the value from column "A").

PERSONAL VALUES	A	B	C	D
Accomplishment (achieving; mastery)				
Affection (close, intimate relationships)				
Collaboration (close working relationships)				
Creativity (imagination, self expression)				
Economic Security (prosperous, comfortable)				
Exciting Life (stimulating, challenging experiences)				
Family Happiness (contentedness with loved ones)				
Freedom (independence, free choice)				
Religion (inner harmony, serenity, peace)				
Order (stability, predictability)				
Personal Growth & Development (use of potential)				
Trust (in self, and others)				
Pleasure (enjoyable, fun-filled life)				
Power (authority, influence over others)				
Responsibility (accountable for important results)				
Self-Awareness (inner knowledge, self honesty)				
Self-Respect (self-esteem, pride)				
Social Recognition (status, respect, admiration)				
Winning (competition with others)				
Wisdom (mature understanding of life)				
Other:				
Other:				

5. Circle the 5 values with the highest score in column D.
 1. Do you believe these highest scoring values are the most important to you?
 2. For these values, consider the satisfaction scores in Column A? On which values do you want to

increase your satisfaction?

6. Your next task is an important one. From the results of your Personal Values Worksheet, the exercises you did and your self-questioning, list below the five personal values that are most important to you. The order of listing makes no difference.

Weighed Criterion Of Your Personal Values

Most Important Personal Values	Importance Weight

7. Evaluate Importance
 1. Decide which one of the five personal values is most important to you and place a 10 opposite that value in the "Importance Weight" column.
 2. Compare the other four values to your first choice and assign each an appropriate number from 1 to 9. Ask yourself such questions as, "Is this value about 80% as important as my first value?" 'If so, assign the value an importance weight of 8.
 3. Continue until all five values have been weighed. Each of your 5 values should have a different weighting.

Exercise #4

What do you appreciate most about your life today? (Identify 3-5 things that you don't want to see changed.)

What things would you like to change in your life? (List 3-5 items)

What do you need from society and your community in order to accomplish the life that you choose to live? (List 3-5 items)

Identify things that you contribute back to the well being of your community and society. (List 3-5 items)

PUT IT ALL TOGETHER INTO A PERSONAL HOLISTIC GOAL

Each individual writes their Quality Of Life Statement, Forms of Production, and Future Resource Base in a single document. Combining them as a group comes later. A template is provided on page 12.

This section is paraphrased from *Holistic Management* by Allan Savory and Jody Butterfield.

“QUALITY OF LIFE STATEMENT”

1. Using what you learned in the exercises, write your “Quality Of Life Statement.”

- Think of your Quality Of Life Statement as a personal mission statement. It should inspire you.
- You do not have to include anything from the exercises. Focus on what really matters to you.
- Don’t over think it. Setting a timer for 5-10 minutes is helpful for some people.

2. Review the statement you just wrote. Be sure it addresses what you most value in these areas.

- Economic well-being
- Human relationships
- Personal growth
- Contribution to others
- Personal health

DETERMINE YOUR “FORMS OF PRODUCTION”

Still working as an individual, go through each part of your Quality Of Life Statement to determine what must be produced in order to move that goal to reality. (This doesn’t mean that you create a “product.”)

- Ask the question: **“What don’t we have now, or what aren’t we doing now, that is preventing us from achieving this?”** **Rephrase the answer in positive terms** and you will know what you have to produce.
 - For example, the year we bought a refrigerated truck, the answer to why aren’t we meeting our physical and emotional health Quality of Life goals was, *we don’t get enough SLEEP!* Rephrased in positive terms became, *a quiet space and designated time for the sleep we need.*
- One form of production might meet several of the needs described, and vice versa.
 - For example, if one of your Quality of Life statements was “to enjoy what we do everyday,” that could be met in part by producing *a balance between our work and personal lives, or sufficient time for strategic planning and/or sufficient time to address the small improvements that would increase efficiency ach day.*
- Some have questioned the necessity of including such things as “a balance between our work and personal lives” or “a retirement plan.” **Only by including them are they likely to be produced.**
- **List only what has to be produced, not how it will be produced.** How something is to be produced is a “strategy decision” that needs testing. You will find that there are multiple ways to accomplish your holistic goals. For many people, their Quality Of Life goals don’t change much, even when people change careers. The how-to accomplish them often evolves over the years.
 - The how to accomplish *quiet space and designated time for the sleep we need* has changed over the years. At the point we bought the refrigerated truck, it required changing the farm system. At a different point in time it was accomplished with multiple sleeping spaces.

DETERMINE YOUR “FUTURE RESOURCE BASE”

Now write what your Resource Base will need to be like years from now in order to sustain the things listed in your Forms Of Production. The three things you should always include in your Future Resource Base description are a description of **the land, the people, and the community**.

- **What will the landscape need to be like?** In 20 years, 50 years, 100 years?
- What **services will be required from the community** to sustain your forms of production? What characteristics would you like your local, and regional, community to have, far into the future?
- In describing the people in your future resource base you **describe how you and your business, organization, or whatever, will have to be seen** to be, far into the future, for these people to remain loyal to you, respectful, or supportive, or whatever is required. Vary the attributes according to the people you are concerned about, whether they be clients and suppliers, extended family, environmental groups, or a representative from a regulatory agency.

HOLISTIC GOAL of _____ Date _____

Quality of Life Description	Form of Production Description	Future Resource Base Description
		The Land
		The People
		The Community

3rd Step: The Collaborative Process – Creating The Group Holistic Goal

When everyone has completed the private process come together as a group. Again, set aside a time to do this when you can all focus. This may mean hiring a babysitter or taking a “retreat” away from the farm. If your goal is a farm that meets the needs of all the stakeholders, this is one of the most important processes your farm team will do. Commitment to this process is integral to its success.

Share what each person created. There are many ways to do this. You might take turns reading out loud and answering questions about your personal holistic goal, or interview each stakeholder.

First Seek To Understand. Then Seek To Be Understood.

- The most important thing here is for everyone to understand the values and goals of each other.
- Do not try to challenge or change each other’s values and goals.
- Find the areas where individuals’ values and goals relate to each other.
- Some goals might not be initially shared by everyone, but should become part of the group holistic goal.
- Remember: not everybody has to agree about everything, but everybody needs to agree to make the individual goals part of the goals of the whole.
- Find ways of expressing these differing goals that combine and collaborate.

Collaboration

For example, T.J. wrote in his Quality of Life goal that he values order and structure—it is important for him to function well. He has identified that a clean, organized house and farm are the Form of Production to meet this Quality of Life goal.

Jean states that autonomy is critical to her Quality of Life. Her Form of Production to meet her need for autonomy is having clear, agreed-upon areas of responsibility and decision-making so that she can manage her daily work as independently as possible.

For the “whole” to succeed, these needs must be worked towards by every member of the whole. Jean will need to contribute to a clean, organized house and farm, and T.J. needs to contribute to clear, agreed-upon areas of responsibility and commit to clear boundaries that will support Jean’s needs.

Strategies To Meet Goals

There are many ways to accomplish goals. That’s where strategies come in. For example, everyone can share tasks to accomplish a clean, orderly home and farm, or it might be accomplished by hiring someone else, or by one person doing less farm work and more cleaning . . . you’ll figure that out. However, avoiding or subverting the needs of a stakeholder will likely lead to conflict, dissatisfaction, or possibly relationship failure.

<p style="text-align: center;">Collaboration, Is The Objective Not Compromise, Competition, or Avoidance</p> <p>Collaboration: You and I work together to find an agreeable solution to the problem that meets the needs of both. Collaboration allows for differences and can be I win – you win, because we are willing to work together.</p> <p>Compromise: You and I both give up part of what we want or need to settle the problem. In best case scenarios compromise can be "I win some- you win some." However it can also result in I lose – you lose, with neither person getting their needs met.</p> <p>Competition: Either you or I will win, but not both of us. This is a form of fighting. As a result, "I win - you lose," because only one can win.</p> <p>Avoidance: I ignore or refuse to acknowledge the existence of conflict. As a result, " I lose - you lose," because nothing can be done about it.</p>
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Most likely, there will be times that the house and farm are not as clean as T.J. prefers, or that Jean's need for autonomy has to accommodate being in a partnership. Having a plan and a mutual commitment to work toward goals can accomplish a lot, and can increase tolerance for accepting the times when goals aren't met.

Once you have an agreed upon Goal:

- Be sure to write it down!
- Post it where you will all see it often.
- Incorporate the concepts into your conversations and decision-making processes.
- Hold yourself accountable for making decisions that move you towards your holistic goal.
- Establish a time and process to evaluate your progress and reevaluate.

Work-life balance? Is it realistic? What does it mean? We still have to choose what is most important to us. Work, family, personal needs . . . the point is to not get so lost in it all that you lose self-care and relationships. Self-care doesn't mean you get to do everything. We have to pick what is most important to us and prioritize and schedule it.

See **Time Management & The Eisenhower Box**

www.atinadiffley.com/quality-of-life

Now What? Systems To Accomplish Your Goals

Goals are targets. They must be paired with systems that make them happen. This is the how-to of your operation. Consider these points as you incorporate your goal into your decision-making process.

- **Think Of Your Goal As A Guide For Your Journey, Not An End Point:** A focus on a lofty goal far in the future can reduce current happiness. Use your goal to help you make decisions that lead to what you want your life to be. Enjoy the present moment and improve at the same time. You will likely spend far more time traveling on this journey than at the end point. It's the travel that will make or break you.
- **Review And Redirect:** Goals can blind us to the importance of redirecting when something isn't working. A goal-based mentality may tell us to keep going, when we would be better served redirecting. Time and experience provides new information. We need to be flexible and integrate new information on a regular basis. Changing direction is not failure, rather, failing to redirect when our strategy isn't accomplishing our goals is.
- **Build Feedback Loops:** Goals can suggest that we control things that we actually have no control over. We try to plan where we will be and when we will make it there. We try to predict how quickly we can make progress, even when we have no idea what circumstances or situations will arise along the way. Build a system that can signal when you need to make adjustments. For our farm this requires multiple feedback systems to address daily, weekly and annual goals. Daily goals are often small piece of information. For example we have designated areas of responsibilities so we pass feedback information between the areas. The person in charge of planting tells the person in charge of field prep if the field prep met the planting needs, if not, what was the challenge. This allows the field prep person to utilize the information in future decisions and prevents micromanaging across areas of responsibilities. Annual goals include big picture feedback such as financials.

Testing Actions and Decisions: Holistic Management Questions (Allan Savory with Jody Butterfield)

Use your holistic goal to test whether a particular action will take you toward or away from your holistic goal and help you systematically consider the social, financial, and environmental aspects. Focus on big decisions. You don't need to run every small, daily decision through this complete screen. Sometimes you'll need to go ahead with an action that fails most of the tests. In this case you know there's a problem, and you can plan the better action you'll take when you can.

1. Cause and Effect: Does this action address the root cause of the problem, or merely a symptom?
2. Sustainability: If you take this action, will it lead toward or away from the future resource base described in your holistic goal?
3. Weak Link:
 - a. Social: If you take this action, will you encounter or create a block to progress?
 - b. Biological: Does this action address the weakest point in the life cycle of the organism you're trying to control or promote?
 - c. Financial: Does this action strengthen the weakest link in the chain of production?
4. Energy /Money Source & Use
 - a. Is the energy or money to be used in this action derived from the most appropriate source in terms of your holistic goal?
 - b. Will the way in which energy or money is to be used lead toward your holistic goal?
5. Society & Culture
 - a. How do you feel about this action now?
 - b. Will it lead to the quality of life you desire
 - c. Will it adversely affect the lives of others?
6. Marginal Reaction: Is there another action that could provide greater return, in terms of your holistic goal, for the time and money spent?
7. Gross Profit Analysis: Which enterprise contributes more to covering the overheads of the business?

See **Weakest Links**
www.atinadiffley.com/quality-of-life

- Additional Reading:** 1. Holistic Management: A New Framework for Decision Making, Allan Savory with Jody Butterfield
2. <http://holisticmanagement.ca/how-to-write-a-holistic-goal/>

Criteria Screen³

A criteria screen can be an effective decision-making tool to test potential strategies against the criteria of your holistic goal, especially for big decisions that have a long term impact or affect multiple people. It:

- Provides a process to include and understand the values and needs of all of the stakeholders in a decision.
- Stimulates potential strategy ideas that are outside of our normal brain maps and routines.
- Guides evaluation of potential strategies as to how well they accomplish our Quality of Life criteria.
- Helps us decide what matters most. We might not be able to meet all of our criteria to a maximum level.

Criteria Screen Process

A Criteria Screen template for your use is provided on the last page of this document.

1. **Identify the Big Question** you want to evaluate.⁴
 - a. The importance of laying the proper groundwork before evaluating a strategy is emphasized in a quote from Albert Einstein. *If I had an hour to solve a problem and my life depended on the solution, I would spend the first 55 minutes determining the questions to ask, for once I know the proper questions, I could solve the problem in less than 5 minutes.*
 - b. Consider carefully who is affected by and should be involved with the decision. You might have two levels of stakeholders: primary and secondary.

Stakeholders: Primary and Secondary

- **Primary stakeholders** are the people who are most affected by the decision and the primary decision makers.
- **Secondary stakeholders** are affected by the decision but might not make the final decision or have the same weight on the final decision. It can be important to understand their criteria, and include them in strategic planning.

Case Study:

1. Big Question

Martin and I often use the *Criteria Screen* as part of our process when we are making big decisions.

On one occasion we were working on shifting our focus to life goals other than fulltime farming. It wasn't that we weren't enjoying farming anymore. We wanted to free up time and creative energy from the focus of the farm to develop other interests: writing, public speaking, helping farmers succeed, and studying music.

We first spent time collecting information about our present structure and assets. We articulated and challenged our assumptions. We talked with our kids—secondary stakeholders—and were reasonably certain they were not going to change their minds in the future and want to run the business.

We cycled through our big question in different formats: What, Why, How, When, Where, Which, and Yes or No. This helped us articulate what we really needed to ask. Some of the questions we shaped include: *What should we do with our lives? Should we quit farming? What is most important to us?* Different questions would have led us toward different strategies.

The big question that we ended up working with was: *How do we want to structure our time, living situation, and assets to accomplish our future life goals?*

³ Adapted from, *The Nonprofit Strategy Revolution: Real-Time Strategic Planning in a Rapid-Response World*, David La Piana

⁴ For further exploration on writing powerful questions see, *The Art Of Powerful Questions*, Eric E. Vogt, Juanita Brown, and David Isaacs http://umanitoba.ca/admin/human_resources/change/media/the-art-of-powerful-questions.pdf

2. **Identify The Important Criteria:** to evaluate your big question by.
 - a. 4-6 is an effective number of criteria. More than 6 is generally too many.
 - b. One of your criteria should address your financial needs.
 - c. You may find that some of your criteria are similar and can be combined into one concept.
 - d. Look to your holistic goal to inform your criteria.
 - e. Include the values and needs of all the stakeholders in your criteria development.

3. **Brainstorm Potential Strategies** to address your big question.
 - a. Set a goal of a minimum of 20 ideas. Often it takes a few crazy ones to get the juices flowing. Write them down as they come.
 - b. In your brainstorm, temporarily suspend judgment—that includes financial impacts. You will evaluate later in the scoring process. Analysis at this point shuts down the process.
 - c. Any idea is great. **Yes and!** is a good response. Crazy ideas from can morph into creative solutions.

4. **Discuss The Potential Strategies**
 - a. There may be some that you'd like to work on developing further before evaluating.
 - b. Decide which of them you'd like to score.

5. **Score Each Potential Strategy**
 - a. For each strategy, ask, *on a scale of 0-5, if we do this strategy, how well do I expect we will meet this criteria. (5 is best)*
 - b. First do this scoring each person independently without discussion. The goal is to bring out everyone's perspective for an in-depth analysis.

Case Study Continued:

2. Identify Criteria

- a. Our criteria included financial stability, what we might think looking backwards in time from our death, how the strategy would serves our family, community, and the world, self-care, and how well the strategy might serve our new life direction.
- c. Emotional, personal, and physical health are of high importance to us and are linked criteria—they affect each other. They were combined into one criteria of self-care. The term self-care helps us address these needs through an active concept because meeting our health goals requires dedicated time, planning, and effort.
- d. These criteria reflected our holistic goals of self-care, and meaningful lives that serve our family, community, and the world. The deathbed criteria helped us to consider our holistic goals from a hindsight perspective.
- e. Martin and I were the primary decision makers. We first laid out our criteria together. Then we had a discussion with our kids to gather their input on criteria. They were secondary decision makers in this decision—what we did with the farm would affect them even though they were no longer directly involved and they have expressed that they have no desire to run the farm in the future. They also provided valuable input, perspective, and insight. They knew they would not be final decision makers.

3. Brainstorm Potential Strategies

Brainstorming gave us 20 unique—YES and!—strategies. Some of them seemed crazy—*spend 4 years living in a different city of the world each month*. Others seemed non-adventurous (to me)—*continue a downsized farm, hire a manager and farm half time*.

4. Discuss Potential Strategies

One potential strategy from the brainstorm that caught our interest and generated a lot of discussion was *downsize and farm half time*. We discussed what we saw as pros and cons about the idea. This led to the additional potential strategy of *rent the farm to a beginning farmer and focus 100% on our new life goals*.

Below is an example of the *Criteria Screen* with 5 of the 20 strategies that Martin and I evaluated.

Before we evaluated our scored strategies we asked; *if we take no action, just let life happen, which of these strategies is most likely to happen—the default.* We were fascinated later, when the two strategies we had identified as defaults, got low scores in the evaluation process.

5. Score Each Potential Strategy

Martin and I have very different thinking processes and ways of perceiving. This can be a big challenge if one of us gets caught up with being right. However, when we work together and incorporate our diverse perspectives, the reality that we are so different is a huge asset to our decision-making. When we come back together to discuss our scores we often have significantly different numbers. We each think about the criteria through different lenses. This gives us a broad and valuable analysis to make a solid decision with.

Question: <i>How do we want to structure our time, living situation, and assets to accomplish our future life goals?</i>					
Stakeholders Involved: Atina and Martin—primary, kids—secondary				Date: 11.5.2005	
Strategies →	<i>Downsize farm, hire a manager, farm half time.</i>	<i>4 years living in a different city each month.</i>	<i>Sell out in MN, move to Montana mountains.</i>	<i>Restructure farm as rental to a beginning farmer. Dedicate life to new goals.</i>	<i>Keep farm as is, work on selling farm to employee.</i>
Criteria ↓					
Financial stability	3	2	5	4	4
Serves our family	3	2	1	4	3
Serves the community	3	1	3	5	3
Focus: new life goals	2	3	3	5	2
Look back from death	0	2	3	5	2
Self-care	1	2	3	5	2
TOTAL SCORE	12	12	18	28	16

6. **Total Your Scores** The highest score doesn't automatically make it the best decision. This is a discussion and creativity tool.
7. **Discuss:** After each person has finished scoring, share your numbers and discuss.
 - a. Look first for where you are in agreement.
 - b. Share your different perspectives without trying to change each other.
 - c. Work to understand each other's perspective. Ask questions, like, *tell me about your thought process on ____.*
8. **Discuss Your Next Steps.** Consider using an *Action Plan* to support planning and implementation.⁵

Case Study Continued:

Before we began this process we were confused and felt stuck. The process raised questions, helped develop our thinking, and gave us an invaluable tool to evaluate ideas.

This was a BIG decision for us. When we began the process in 2005, our farm was 36 years old, financially successful, and had been our fulltime work focus for decades. The Criteria Screen was one of multiple processes we used. As we moved through the process our potential strategies evolved. *Restructure farm as a rental to a beginning farmer and dedicate life to new goals*, combined with *sell the business* and with *live in Montana*.

In 2008 we sold our name and equipment to one of our customers. The farmland has been placed into a conservation easement to protect it from development; the land has been fenced with a NRCS grant and is being rotationally grazed by a beginning farmer. Martin and I spend time both on the MN farm and in Montana. Our primary life focus is now as we envisioned—writing, public speaking, helping farmers succeed, and music.

⁵ Download *Action Plan Template* at www.atinadiffley.com/quality-of-life

