

Create A Holistic Goal

A “goal” is a desired result we work toward.

Have you ever tried unsuccessfully to move something heavy with another person, only to discover that the two of you have been pushing 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.

The term “holistic goal” comes from a school of thought called Holistic Management. It is a three-part goal describing:

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.

These three parts are all critical to a comprehensive holistic goal that can lead us to 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. An example from my own life is that our goal was initially focused on creating an economically viable farm. To do this we expanded our production and mechanization. Our farm became larger, and everything moved faster. We accomplished our profitability goal relatively quickly only to discover 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 incorporated it into our goal and decision making process. If we had, we would have created a different farm. We had to create and implement a holistic goal that addressed our personal needs and values, or burn out.

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 accomplish them changes.

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 to (monitor);
3. We can correct our course when things go wrong (control);
4. We reevaluate and redirect as our lives, markets, needs, change, and when big things go wrong (replan).

Schedule it.

The reality for most farms is that creating a holistic goal is an urgent and important task that 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. Do it.

A Few Helpful Definitions

A goal is a desired result we work toward. A mutual goal requires agreement from all parties.

- **Big goals** generally affect multiple people and are long term. Big goals should receive extensive planning and evaluation with all stakeholders' input. Big goals should 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 decided by the person they affect. They are not generally part of a holistic goal process.

A holistic goal is a three-part goal describing the quality of life desired, the forms of production to get there, and the future resource base that the forms of production depend on.

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 judged or decided.

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 need to participate in setting the goal.
- Keep adjusting the goal until it matches what everyone wants, and people buy into it and consider it theirs. Most people are able to create a 1st holistic goal in several sessions.
- As trust grows, and people discover what they truly need and value, the goal may change with time. Readjust the goal as peoples' needs, enthusiasms, and priorities change.

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 are not be included in your goal—the how to get it. 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.

Fill out Exercise 1: Defining the Whole Under Management on page 3.

2nd Step: 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.

The Private Process

Preliminary Exercises

Before working as a group, each stakeholder works individually on articulating his or her own Personal Holistic Goals. Exercises two to five 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 all discussion until everyone has written their complete holistic goal.

Personal Values Exercises

Exercise #2

"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 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

Take a few minutes to jot down your impressions.

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

Exercise #3

For the five assets below, physical, mental, spiritual, social emotional, and excellence:

1. On line 1, based on what you want for yourself, indicate where you presently fall on the scale in building and using these assets.
2. On line 2, write your personal goal for this asset.

	Physical Health	Body strengthening 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 Physical Health Goal:		

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

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

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

Exercise #4

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 ranking (from 0-5) 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.

Weighted 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 weighted. Each of your 5 values should have a different weighting.

Exercise #5

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)

PULL 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 9. This page 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
 - Contribution to others
 - Human relationships
 - Personal health
 - Personal growth

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. 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.”
- “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, holistic goals don’t change much, even when people change careers. The how-to accomplish them and Forms of Production often change over the years.

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. This is your life and business you’re talking about!

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.
- Find the areas where individuals’ values and goals relate to each other.
- Do not try to challenge or change each other’s values and goals.
- 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.
- Accommodation, not compromise, is the objective.

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 his 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.

There are many ways to accomplish goals. That’s where strategies come in. For example, both parties 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 . . . they’ll figure that out. However, ignoring or subverting the needs of a stakeholder will lead to conflict, dissatisfaction, or possibly relationship failure.

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 somewhere 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.

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—not redirecting when we should 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.

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?

- Additional Reading:** 1. Holistic Management: A New Framework for Decision Making, Allan Savory with Jody Butterfield
2. http://www.purplepitchfork.com/uploads/4/2/5/9/42595701/doc_goal_formation_packet.pdf
3. <http://holisticmanagement.ca/how-to-write-a-holistic-goal/>

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