

Zone Chairperson Workshop

Zone Goal Setting and Action Planning



Instructor Guide

SESSION BACKGROUND

Setting goals and creating action plans are a necessary part of being a leader. It is through the achievement of our goals that we have become the largest humanitarian organization in the world and impact millions of lives each year.

In this session we will explore how to set meaningful goals (SMART goals) and discuss how to build action plans that will help you be successful in reaching your goals as zone chairperson.

SESSION OBJECTIVES

At the end of this session, participants will be able to:

- Set SMART Goals
- Create Action Plans
- Apply SMART Goals and Action Plan Knowledge

SESSION PREPARATION

Preparation Suggestions:

- **Consider the technical requirements for the session.** *Do a test of the laptop/computer, the LCD projector and screen, PowerPoint slides, and the wireless mouse/laser pointer, if available.*
- **Conduct an inventory of the materials for the session.** *Use the Training Materials Checklist in the Instructor Planning Guide to verify that you have everything you need for the session.*
- **Review all activities that will take place during the session.** *Have you obtained and organized all materials needed to complete the activities?*
- **Review content prior to the start of the session.** *Ensure that you understand the content and that you know how to execute the supporting activities.*

MATERIALS

- Instructor Guide
- Participant Manual
- PowerPoint slides

EQUIPMENT

- Computer
- LCD projector and screen
- Wireless mouse/laser pointer (optional)

ACTION ICONS



**Refer to
Participant Manual**



Activity

SESSION TIMELINE

	Overview of Instruction	Materials
<p>INTRODUCTION (5:00)</p>	<p>Presentation: Session Objectives</p>	<p>PowerPoint slide</p>
<p>MODULE 1: <i>Set SMART Goals</i> (20:00)</p>	<p>Presentation/Discussion: Set SMART Goals</p> <p>Activity: SMART Goal Statements</p>	<p>PowerPoint slides</p> <p>Participant Manual</p>
<p>MODULE 2: <i>Create an Action Plan</i> (20:00)</p>	<p>Presentation/Discussion: Create an Action Plan</p> <p>Activity: Create an Action Plan</p>	<p>PowerPoint slides</p> <p>Participant Manual</p>
<p>MODULE 3: <i>Apply SMART Goal and Action Plan Knowledge</i> (25:00)</p>	<p>Presentation: Apply SMART Goal and Action Plan Knowledge</p> <p>Activity: Zone and District Goals</p>	<p>PowerPoint slide</p> <p>Participant Manual</p>
<p>CONCLUSION (5:00)</p>	<p>Presentation: One Last Thought</p>	<p>PowerPoint slides</p>
Total Time: 75:00		

INTRODUCTION

Total Time: 5:00

PRESENTATION: SESSION OBJECTIVES (5:00)

State

Prior to attending this workshop, you were asked to take the Goal Setting online course and to bring two goals with you. One of those goals should be a goal you have for your zone and the other goal should be a shared one with your district governor. We will use what you learned in your online learning and the goals that you brought to this workshop to do a deeper exploration of creating SMART goals and action plans.

Ask your participants if they finished the online Goal Setting course. If some of them have not yet taken it, assure them that they will be able to follow along with this session and encourage them to still take the course after completing this workshop.

Also verify that they brought their goals with them to the workshop. If you have participants who have forgotten to do this, give them a moment or two to think of two goals they can use in this session.

Show

Display Slide 1: Session Objectives



State

By the end of this session, you will be able to:

- Set SMART goals
- Create an Action Plan
- Apply SMART Goal and Action Plan Knowledge

Transition

This session will give you the opportunity to work through creating SMART goals and action plans that directly apply to your role as a zone chairperson.

MODULE 1: Set SMART Goals

Total Time: 20:00

PRESENTATION/DISCUSSION: SET SMART GOALS (10:00)

Show

| *Display Slide 2: Set SMART Goals*

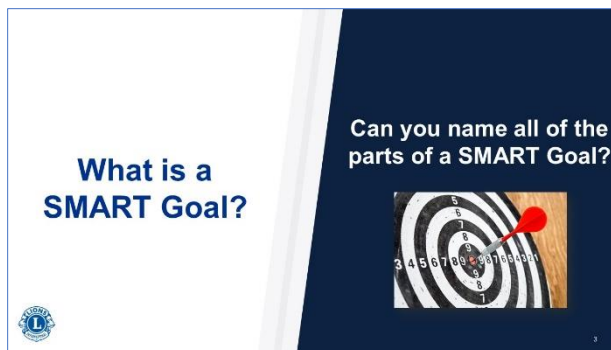


State

Let's get started with module 1, Set SMART Goals.

Show

| *Display Slide 3: What is a SMART Goal*



Ask

Let's do a quick review from your online learning. Can anyone tell me what makes a SMART goal different from ordinary goals?

Ask participants what the attributes are for creating a SMART goal. Ask for volunteers to share one attribute each. The answers you are looking for are that SMART goals should be specific, measurable, actionable, realistic and time-bound. Thank them for sharing their answers.

Show

Display Slide 4: Quote



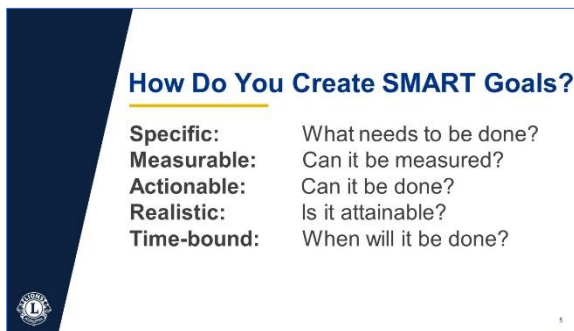
Read the quote to your participants. Ask 2-3 participants to share their thoughts about the quote.

State

Goals are very powerful because they allow you to transform situations or create outcomes that didn't previously exist. When you create SMART goals and supporting action plans you will feel that sense of empowerment more consistently, because you will have clearly defined goals and action plans that will help you achieve success.

Show

Display Slide 5: How Do You Create SMART Goals?



State

Now that we have reviewed SMART goals, let's discuss how you can create them. A useful SMART goals technique is to ask yourself the following questions:

- To make your goal **specific**, ask yourself “*What needs to be done?*”
- To make your goal **measurable**, ask yourself “*Can it be measured?*”
- To make your goal **actionable**, ask yourself “*Can it be done?*”
- To make your goal **realistic**, ask yourself “*Is it attainable?*”
- To make your goal **time-bound**, ask yourself “*When will it be done?*”

State

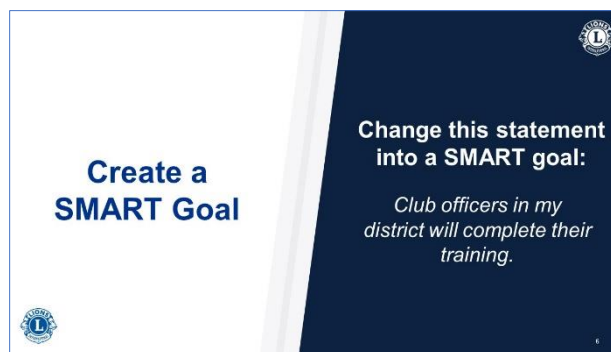
The answers to these questions will help form the foundation of your SMART goals. Your goals will be much easier to execute because they are not vague or unrealistic. We are going to use a practice goal and apply the SMART technique.

Ask

Before we get started on our practice goal, does anyone have questions about using the SMART technique?

Show

| *Display Slide 6: Create a SMART Goal*

**State**

Let's discuss the goal on this slide. It seems like a good goal when you read it. But when you apply the SMART goals technique you begin to realize that it isn't a strong enough goal.

State

Let's turn this goal into a SMART goal.

Go through the SMART questions one at a time. Call on one participant and ask them to make it a more specific goal. Call on the next participant and ask them to make it a measurable goal and complete the process of using the SMART questions until you have a goal that sounds like a SMART goal.

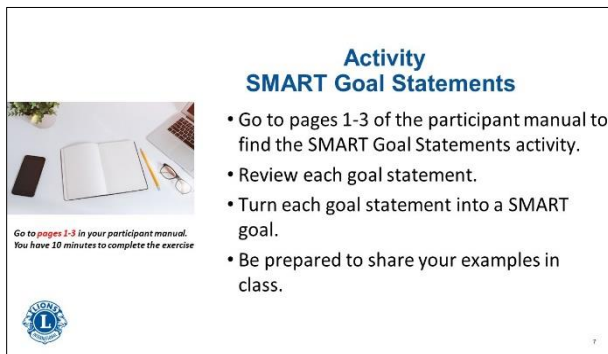
Ask

Does everyone understand how they can use these questions to formulate SMART goals?

Pause and answer any questions that your participants have.

ACTIVITY: SMART GOAL STATEMENTS (10:00)**Show**


Display Slide 7: Activity - SMART Goal Statements



Activity
SMART Goal Statements

- Go to pages 1-3 of the participant manual to find the SMART Goal Statements activity.
- Review each goal statement.
- Turn each goal statement into a SMART goal.
- Be prepared to share your examples in class.

Go to pages 1-3 in your participant manual.
You have 10 minutes to complete the exercise.



7

State

Now that we have had practice turning a goal into a SMART goal, let's work individually with some example goals to turn each of them into a SMART goal.



Activity Directions

Ask your participants to work on this activity individually.

Refer participants to pages 1-3 in the Participant Manual.

Give the following directions:

- Open your participant manuals to page 1 to briefly review the SMART goal questions we discussed in class.
- Tell your participants after they review the SMART questions to go to page 2 to begin the activity.
- Tell your participants to read each goal statement and use the SMART goal questions to turn each of those goal statements into smart goals.

Ask if there are any questions.

Begin the activity.

Call time after 10 minutes.

**Ask for volunteers to share their revised goal statements.
Ask for two examples of each goal statement.**

Debrief the activity by reminding participants that getting in the habit of forming SMART goals will help them become more successful in reaching their goals.

Transition

Now that we have had practice creating SMART goals, let's move on to module 2 to see how to create action plans.

MODULE 2: Create an Action Plan

Total Time: 20:00

PRESENTATION: CREATE AN ACTION PLAN (10:00)

Show

| *Display Slide 8: Create an Action Plan*



State

Action plans help people track the steps and measures of progress that need to be done to achieve their goals. They are a very important part of strategic planning for both your zone and district.

Show

| *Display Slide 9: Quote*



| *Read the quote to your participants. Ask 2-3 participants to share their thoughts about the quote.*

State

The effectiveness of your goals and your ability to achieve them depends on many things. Your motivation, follow-through and the steps you take to achieve your goals will affect not only how quickly your goals are achieved, but if they are achieved at all.

In 2017 Forbes magazine reported on a remarkable study that was conducted in a Harvard MBA program. Students in the program were asked if they had written goals and actions plans to achieve them. Only three percent of the students had written goals and action plans.

After ten years, the same group of students were interviewed again. The three percent who had written goals were earning, on average, ten times more than the other 97 percent of the class. This speaks clearly to the importance of not only having goals, but of the importance of creating action plans.

We learned in our last module how to create SMART goals. In this module we will learn how to create action plans. Action bring our goals to life.

Show

| *Display Slide 10: Example Action Plan*

Example Action Plan				
Smart Goal Statement				
Action Step	Responsible Party	Required Resources (team members, technology, funding, etc.)	Date to Begin	Due Date
Assessment		Alterations		

State

On this slide is an example of an action plan that is used in our organization. We will get practice using it in our next two activities.

Show

| *Display Slide 11: Parts of an action plan*

**State**

Let's take a moment to review how to use each part of the action plan.



Refer your participants to page 4 in their participant manual so that they see the definitions for each part of the action plan. Listed below are the definitions for your reference.

Goal Statement

A goal should be specific, measurable, actionable, realistic and time-bound.

Action Step

Action steps breakdown the main goal into smaller, more specific actions that will be taken to help achieve the goal.

Responsible Party

Who is best suited to complete each step and how will you communicate with and motivate that person to complete their assigned step?

Required Resources

*Are there additional team members needed? Will funding be required? If so, where will the funding come from?
Are specific materials needed to complete an action step?*

Date to Begin/Due Date

Provide a clear schedule for beginning and completing action steps.

Assessment

Review your action plan periodically and determine how you will assess progress towards your goals

Alterations

If the assessment determines changes need to be made, what changes will you make?

Show

Display Slide 12: SMART Action Steps



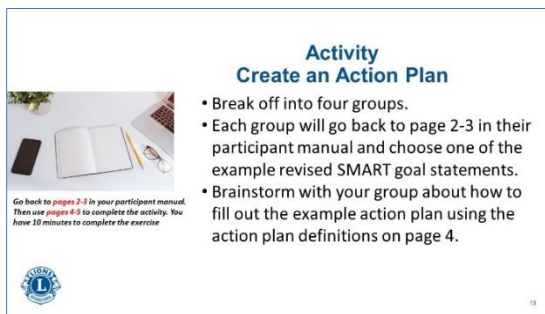
State

As you think about the example action plan we have showed you, keep in mind that you can develop SMART action steps, as well as creating SMART goals.

Some of that is already built into the action plan. For example, the **Date to Begin/Due Date** fields of the action plan reflect the time-bound part of a SMART goal. As you structure your action steps, incorporate as many of the SMART questions as you can.

Show

Display Slide 13: Activity – Create an Action Plan



State

Now that we have reviewed the parts of an action plan, lets break off into groups and use what we have learned to create one.

ACTIVITY: CREATE AN ACTION PLAN (10:00)**Activity Directions**

Ask your participants to break off into four groups.



Refer participants to go back to pages 2 - 3 in the participant manual. Let them know that each group needs to choose a different revised goal statement that they will work on turning into an action plan.

Give the following directions:

- Break off into four groups.
- Each group will go back to page 2-3 in their participant manual and choose one of the example revised SMART goal statements.
- Brainstorm with your group about how to fill out the example action plan using the action plan definitions on page 4.

Ask if there are any questions.

Begin the activity. Call time after 10 minutes.

Ask each group to share how they filled out their action plan.

Debrief the activity by reminding participants that creating action plans is the key to successfully executing their goals. Also remind them that action steps can be crafted in a similar way to SMART goals (specific, measurable, actionable, etc.).

Transition

Does anyone have any questions before we move onto the next module?

MODULE 3: Apply SMART Goal and Action Plan Knowledge

Total Time: 25:00

PRESENTATION/DISCUSSION:

APPLY SMART GOAL AND ACTION PLAN KNOWLEDGE (5:00)

Show

| *Display Slide 14: Apply Smart Goals and Action Plans*



State

We have had the opportunity to explore creating SMART goals and action plans, so now we will use the zone chairperson and district governor goals you brought with you for this activity. We will use most of the time in this module as a working session to create an action plan for your goals.

ACTIVITY: ZONE AND DISTRICT GOALS (20:00)

Show

| *Display Slide 15:
Activity - Apply Smart Goals and Action Plans*

A presentation slide titled "Activity Zone and District Goals". On the left, there is a photograph of a desk with a laptop, a smartphone, a pen, and a notebook. Below the photo, it says "Go to pages 6-7 in your participant manual. You have 20 minutes to complete the exercise." On the right, there is a bulleted list of instructions. In the bottom left corner, there is a circular logo with a lion and the word "LIONS".

Activity
Zone and District Goals

- Use the zone and district governor goals you brought with you to the workshop.
- Create a zone chairperson goal action plan on page 6 of your participant manual.
- Create a district governor goal action plan on page 7 of your participant manual.
- Give your instructor your completed action plans to be displayed for a gallery walk

State**Activity Directions**

Refer participants to pages 6-7 in the Participant Manual. Tell them they will use the action plans on page 6 for their zone chairperson goal and the other action plan on page 7 for their district governor goal. If you have a participant who did not bring goals with them, give them a moment or two to think of ones that they can use.

When they have completed both action plans, have the participants give them to you so you can post them on the wall for a gallery walk. A gallery walk allows participants to walk around and view work that their participants have done so that they can get ideas that they can use in the future.

If space does not permit you to tape them on the wall, you could have tables exchange their action plans with another table and the participants at each table can view the action plans given to them. You could also have each table choose two participants to discuss their action plans with the other participants.

Give the following directions:

- Use the zone and district governor goals you brought with you to the workshop.
- Create a zone chairperson goal action plan on page 6 of your participant manual.
- Create a district governor goal action plan on page 7 of your participant manual.
- Give your instructor your completed action plans to be displayed for a gallery walk.

Ask if there are any questions.

Begin the activity. Call time after 10 minutes.

Allow your participants to view the action plans in a gallery walk or by having tables switch their action plans. Give them 5 minutes to view other action plans.

Ask

Did anyone notice that they had the same goal as another participant?

Call on a participant or two to share if they noticed this. This will probably happen with some of the district goals, and likely with zone goals too.

Ask

Did seeing other action plans give you any ideas for new goals that you want to achieve or action steps that would be helpful for you with other goals you may have?

State

Debrief the activity by reminding participants that creating action plans is the key to successfully executing their goals.

Show

Display Slide 16: Quote

**State**

Read the quote to your participants. Ask 2-3 participants to share their thoughts about the quote.

Situations can change quickly and sometimes things you had counted on to help you achieve your goals may not be feasible any longer. Try to resist the urge to change your goal and instead revisit your action steps to see what can be changed or adjusted to help you keep your original goal intact.

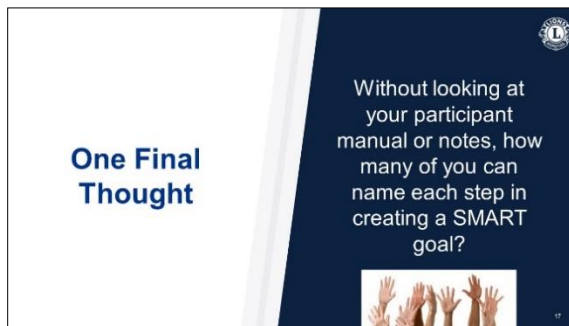
CONCLUSION

Total Time: 5:00

PRESENTATION: ONE FINAL THOUGHT (5:00)

Show

| *Display Slide 17: One Final Thought*



State

Sometimes when people work with SMART goals, they can forget some of the parts that make up a SMART goal. Make it fun and ask your participants, in unison, to say what each part of a SMART goal is (specific, measurable, actionable, realistic and time-bound). Have them repeat it if you think it will be well received. The more they can automatically remember the parts, the more often they will use them.

Sometimes as people create SMART goals, they can forget what the parts of a SMART goal are. So, as a class, let's say out loud what each part of a smart goal is.

Ask

What are the parts of a SMART goal?

Show

| *Display Slide 18: Session Objectives*

**State**

| *Read each of the objectives out loud.*

Ask

Did this session meet the objectives? Does anyone have any questions?

| *Take any feedback given and offer your own feedback as appropriate. Answer questions as you are able.*

State

This session has provided you with an opportunity to work on creating SMART goals and action plans. The ability to successfully achieve your goals will be critical to your zone's success.

| *Conclude the session.*