

Lesson 3 Activities:

Activity #3.1


Clarify Your Values and Create a Personal Vision

Work through the fact sheet: Clarify Your Values and Create a Personal Vision. The fact sheet will walk you through the process and provide example questions to ask yourself that will help you consider what principles, relationships, people, experiences, and things that you value.

Write down your list of values and, using examples from the fact sheet, also craft your personal vision. These will be useful later as you work with family on your farm transition planning.

Activity #3.2

Develop SMART Goals

 For this exercise you will develop two S.M.A.R.T goals. The first is a personal goal, the second is a draft goal for your farm business.

First Goal: Develop a personal S.M.A.R.T goal for taking and completing this course.

- Use the supplemental worksheet provided, SMART Goals-----Development Worksheet.
- Note at the top of the worksheet whether this will be short, intermediate, or long-term goal. (This will likely be a short-term goal---to be accomplished within one year)
- Note at top of the worksheet that this is a Personal Goal.
- Be sure to include notes and information for each for the letters comprising the acronym, S.M.A.R.T.
- On the back side of the Worksheet, identify the action steps that you must take to complete the course within the timeframe you have selected.
- Decide how frequently you will monitor your progress. For a short-term goal such as this, weekly is appropriate.
- Set dates for completion of your action steps, assign target dates for completing and record the date of completion when each step has been accomplished.



Second Goal: Draft a S.M.A.R.T. goal for your farm business. This goal need not be about farm transition, but can be a production or management goal. This will be a draft, because if you share management with any others in the business, you will need to share this with them and jointly develop the final goal. If you are the sole manager, you will develop this goal yourself.

- Use a blank, SMART Goals---Development Worksheet.
- Note at the top of the worksheet whether this will be short, intermediate, or long-term goal.
- Note at the top of the worksheet what aspect of the farm and/or transition process this will address.
- If possible, select a goal or project that you have been discussing with your spouse or farm management team, but have not yet finalized. Also, select a small project or focus for this draft goal.
- Let your farm management team know that you will be working on this draft goal for them to critique and help finalize at a later date.
- Be sure to include notes and information for each for the letters comprising the acronym, S.M.A.R.T.
- At this point in the process, you may want to also draft action steps that may need to be taken to accomplish the goal. Or, you may wait to determine these steps until consulting with your co-manager(s).
- When you have a rough draft completed, share this with your co-manager(s) in a farm business meeting. Use your best communication skills! Be sure to present this goal as a suggestion in a non-threatening manner. Be sincere, when asking for input to help finalize the goal.
- Work jointly with your co-manager(s) to complete the final S.M.A.R.T goal, finalize action steps and determine realistic timelines to accomplish both the major goal and the intermediate actions steps.
- Determine who in your management team will be assigned to monitor progress toward this goal and provide updates to the farm management team.
- Decide how frequently the assigned manager will monitor progress.
- The assigned manager will record the date of completion when each action step has been accomplished.

