

Setting Goals

Participant Name:

Coach Name:

Date:

SAMPLE Goal

What is the challenge or opportunity you have identified that you want to address?

Example: Where I live now doesn't meet my family's needs

What is the goal that you will pursue to meet the challenge or take up the opportunity?

Example: I will move into a new apartment

What would tell you that the goal has been achieved?

Example: I will have my own bedroom, I will feel secure in the building my family lives in, I will be able to get to work, I will have independence

Action Steps

Action Steps	Resources/Support Needed	Target Completion Date	Completed?
1. Determine what my needs are: how many bedrooms, what neighborhood to live in, etc	Someone to talk through these ideas with: my coach!	7/1	7/1
2. Understand how much apartments that meet my needs cost: Use online tools to look for 5 apartments that meet my needs that are available now, and write down how much they cost including: rent, utilities, security deposit, any fees	My coach Where to look online to find this information What my needs are Somewhere to keep track of what I find	7/15	7/20
3. Make a budget of what my income and expenses are now, and figure out how much I can save per month toward future moving expenses	My coach How to determine my income and expenses How to build a budget that makes sense to me	8/1	

By when (month and year) do you expect the goal to have been fully achieved?

July next year

My Goal

What is the challenge or opportunity you have identified that you want to address?

(Example: Where I live now doesn't meet my family's needs.)

What is the goal that you will pursue to meet the challenge or take up the opportunity?

(Example: I will move into a new apartment)

What would tell you that the goal has been achieved?

Identify one or more specific, observable, differences that you will see when the goal has been achieved.

(I will have my own bedroom, I will feel secure in the building my family lives in, I will be able to get to work, I will have independence.)

Action Steps			
Action Steps	Resources/Support Needed	Target Completion Date	Completed?
<i>A goal is not achieved with one step. Identify all the small steps that you need to take in order to achieve your goal. Each action step should contribute substantially to your goal</i>	<i>Identify material or knowledge resources or support needed for the action to be taken successfully. These should be things that you believe it is possible to obtain.</i>		
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			

By when (month and year) do you expect the goal to have been fully achieved?

Not all goals fit within the 6 months of a Women's Money Matters program. Your goal might be achieved in the next 6 months, or it might take a year or more. Realistically, when do you think this goal will be fully achieved?

My Goal #2 (Optional)

What is the challenge or opportunity you have identified that you want to address?

What is the goal that you will pursue to meet the challenge or take up the opportunity?

What would tell you that the goal has been achieved?

Action Steps

Action Steps <i>A goal is not achieved with one step. Identify all the small steps that you need to take in order to achieve your goal. Each action step should contribute substantially to your goal</i>	Resources/Support Needed <i>Identify material or knowledge resources or support needed for the action to be taken successfully. These should be things that you believe it is possible to obtain.</i>	Target Completion Date	Completed?
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

**This worksheet has been adapted from the Accion International Africa Board Fellowship materials.*