

Planning By Objectives

A Manual
for people
who work with
student
volunteer programs

ACTION

NATIONAL STUDENT VOLUNTEER PROGRAM
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A MANUAL FOR PEOPLE
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VOLUNTEER PROGRAMS

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S E C T I O N I

PLANNING BY OBJECTIVES -- A FEW FUNDAMENTALS

Planning by Objectives can be used by any student volunteer or service-learning program in a high school or college. It can be used by paid staff or volunteers; by those who work in central volunteer offices or by the director of an individual project; by people who plan support activities (transportation, recruitment, or training); or by an individual volunteer who is planning his own service commitment. It can be used to plan the direction of the total volunteer effort at your school or to tackle problems or set new directions for a small part of that effort (fund raising, public relations, publicity, or recruitment). This manual should help you cut down on your frustrations, increase your successes, and generally make your work with volunteers more productive and more fun.

The system explained in this manual can also assist you in making a frank evaluation of your efforts and thereby help you get money, staff, and other support. It can also help you keep those resources you already have. It accomplishes this by making evaluation an on-going integrated element of planning and implementation.

This is a time of self-evaluation in education. Dropping enrollments, tight money, searching queries from parents, taxpayers, and legislators, questions about whether or not the students are really learning--all this is forcing the educational system to question what it is and what its programs are accomplishing. Those programs, including service-learning and volunteer programs, that know what they are doing and can prove the impact of their effort have the best chance of surviving and getting the resources they need to accomplish their goals.

A positive reason for trying Planning by Objectives in your volunteer program is suggested in Alice in Wonderland. "If you don't know where you're going, any road will get you there." PBO will help you figure out where you're going and point out the road most likely to get you there. It will help you deal not only with survival in the future but also with the day-to-day problems of every student volunteer program.

Problems We All Face

All of us have some predicaments in common. Do any of these sound familiar? Check those that do. Later you can

apply what you have learned about PBO to develop solutions to these and other problems.

- ° The Volunteer Services Office is constantly being asked to take on new projects. We can't decide what we should and shouldn't do. How do we choose among the unlimited opportunities?
- ° As a leader of a volunteer hospital project, I have more to do than I possibly can. It seems as if I'm doing too many jobs in a mediocre way.
- ° I'm so swamped with work from my volunteer tutoring project that when somebody offers to help me, I don't even know what to ask him to do.
- ° Sometimes, I feel that we are not making good use of student talent. We have great people working with us, but we don't seem to be using their skills creatively. People get frustrated and drop out. It's as if we're wasting our greatest resource--human talent.
- ° We have a hard time explaining exactly what the service-learning program at our high school is trying to accomplish. And if somebody asked us why we do what we do, I'm not sure we could come up with an answer.
- ° We can't really prove we are accomplishing anything. It seems as if our volunteers are providing a real service to the community, but if somebody asked us for hard data, I don't know where to get it. We can't evaluate our impact.
- ° We get lots of praise. People are always telling us what great things we are doing. But I'm not so sure about what are we accomplishing?

The Difference a Year Makes

If Planning by Objectives were applied to those problems and to the organization faced with those problems, a year from now you would find that:

- ° You are beginning to feel organized. You will have more to do than is humanly possible, but you know what is immediate and what can wait. Things seem to be going more smoothly.

- ° When someone offers to help you, you can readily name three or four tasks for him to handle.
- ° Both staff and volunteers seem to be working harder and are more enthusiastic about their participation in the program. Despite problems from time to time, there is a sense that all goes well, and there is an excitement about the work. You know that your program is using human resources more creatively.
- ° Your school has several new service-learning projects, and some of these are beginning to develop clear objectives. Some project leaders have included in their written purpose statements clear descriptions of the work of their project and are finding that this helps them recruit volunteers. You even have some data on the effectiveness of some of the projects, and your advisor is working with you on using that data in a funding proposal.
- ° When someone from the community comes to you with an idea for a new project you might start, you have criteria for deciding whether or not to get involved.
- ° Even though the beginning of the school year is still hectic, you have planned it so that much can be done in advance. You are using your slack season more effectively.
- ° You have a clearer idea of your program's strengths and weaknesses and have data to demonstrate what is actually being accomplished. That data is gathered throughout the year rather than in a last minute evaluation.
- ° You still have problems in the organization, but the crises are not as frequent or as intense. Most problems are handled before they reach crisis level.
- ° Leaders are staying with their products longer, and many seem to be working harder to be more involved. There are written job descriptions for volunteer and paid staff so that people know what is expected of them.
- ° People around the school and in the community understand more clearly what your volunteer program is or is not.

A year is a long time. Much can be accomplished if you get organized now and decide exactly what you want to accomplish, and if you determine the best way to accomplish it. Once you have actually designed a plan, you are on your way to seeing that plan accomplished-- and you will be able to measure that accomplishment. That is what Planning by Objectives is all about. It is a method of developing plans, putting them into effect, and measuring their impact.

A Broad-Based System

This manual takes you through a step-by-step description and testing of PBO. It does not provide technical assistance on any particular aspect of volunteer programming. It does not tell "how to recruit students" or "how to start a volunteer program in a prison." Instead it provides you with a system that you can apply to any area of volunteer work. Planning by Objectives can substantially effect all the problems listed earlier, and it has multiple uses.

- ° It can be used to plan the direction of the volunteer office the coordinating office, the clearinghouse, the umbrella organization, and the overall volunteer service-learning effort.
- ° It can be used to improve the functioning of individual projects, such as a tutoring project or an income tax project.
- ° It can make life easier for your staff, paid or volunteer, giving them a means of organizing their own work and relating it to the whole organization. It can make them feel much more a part of what's going on.
- ° It can provide very real rewards and a sense of satisfaction and accomplishment for the individual volunteer for it can help him to plan for and chart accomplishments.

The Elements of the System

Planning by Objectives is a system for stating what you wish your volunteer program to accomplish and planning means to achieve those goals. This system contains four elements, all interrelated.

1. Purpose
2. Long-term Objectives
3. Short-term Objectives
4. Planning Details

All four elements are hooked together in a sort of "knee bone's connected to the thigh bone" fashion. The chart on the next page indicates the relationship among the elements. Briefly it works like this:

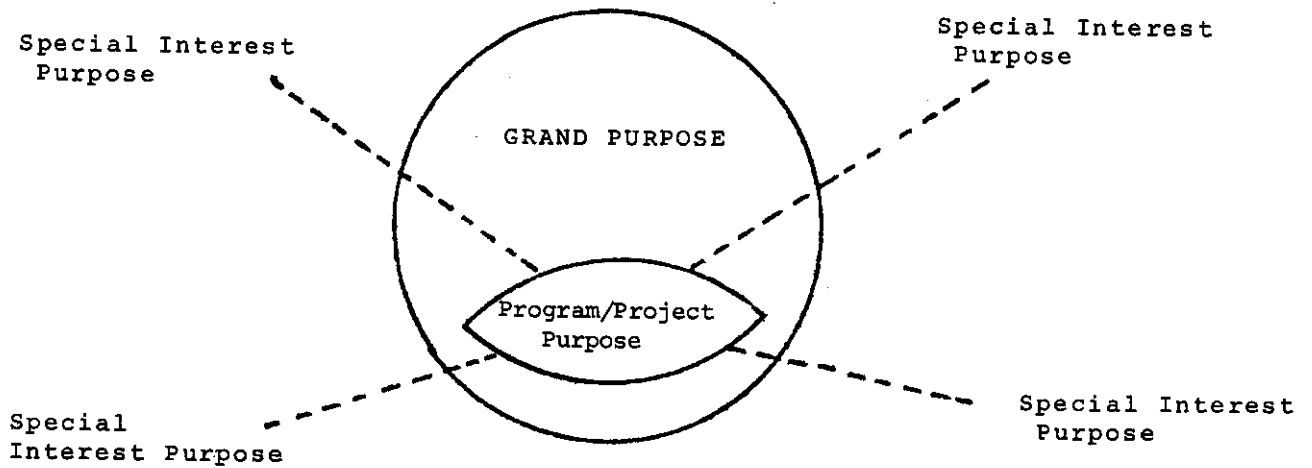
The purpose suggests the long-term objectives,
and
The long-term objectives suggest the short-term objectives,
and
The short-term objectives suggest the planning details.

We will look at all of these elements in turn, first defining them, then testing your understanding of the definitions. We will look at some examples and explain their practical value. We will examine traps and misuses, and finally you will have a chance to apply what you've learned to your own program.

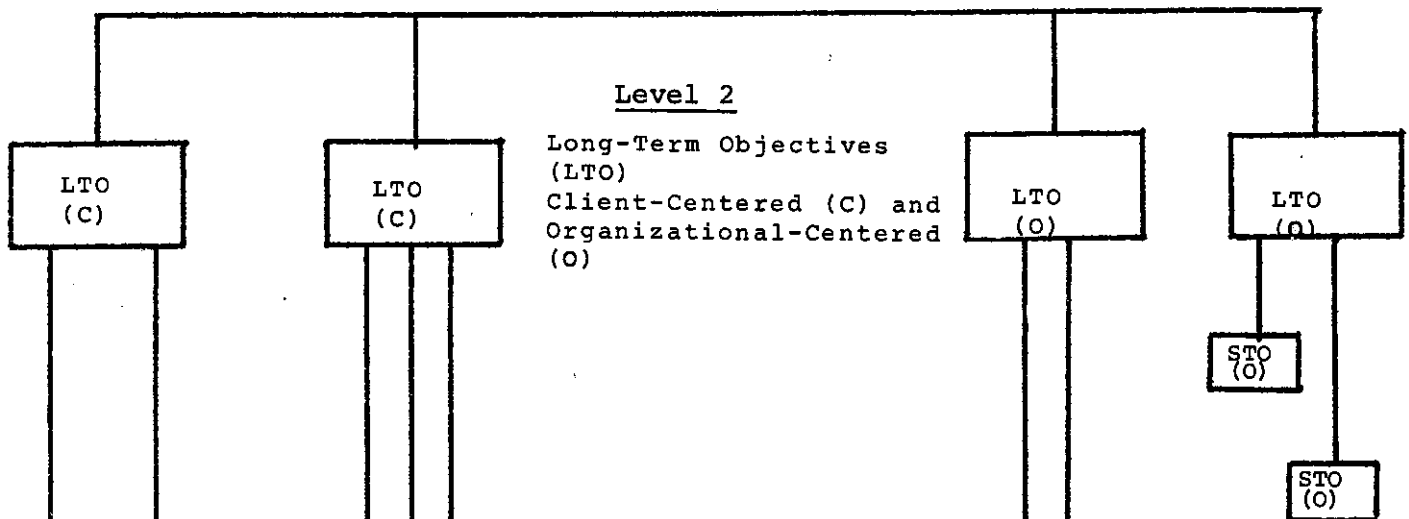
Read through the material on each of the four elements at your own pace. If you find yourself having trouble with one part, backtrack a little. The going is slower at the beginning, but the pace will pick up as you go along.

QUICK REFERENCE PBO SKETCH

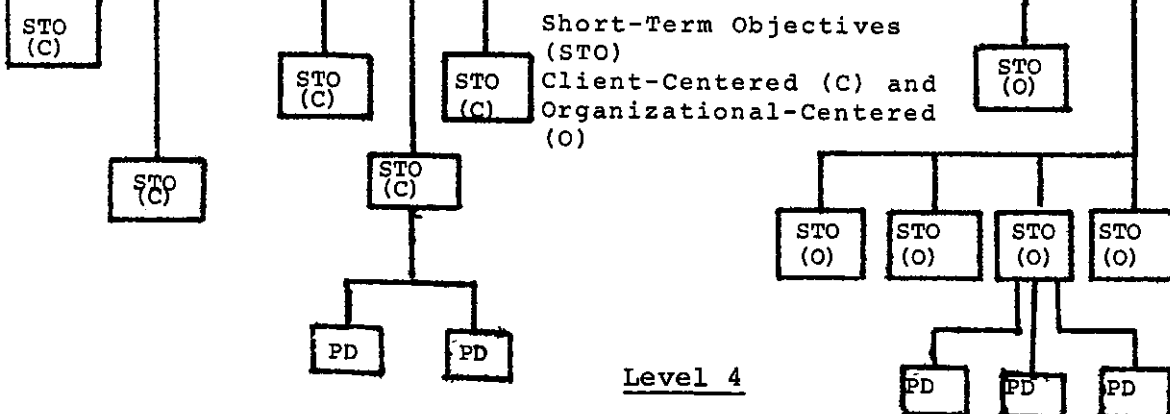
Level 1



Level 2



Level 3



Level 4

Planning Details (Several for each STO)

SECTION II

PBO ELEMENT 1 -- PURPOSE

Every volunteer organization, be it a program or a project, has a purpose, a reason for being. The people in the organization may be unaware of the purpose or unclear about it. They may have different opinions of what the purpose is. But it is there, regardless of its obscurity or the form in which it is stated. It may be hiding in the woodwork, or it may be carved in marble. Either way, you've got a purpose, and it has a tremendous impact on what you do.

Your first task in using PBO is to articulate that purpose in the form of a concise purpose statement. The purpose statement is the broadest possible statement of why you are in business. It reflects your organization's desire to fill a need or something that is missing. It implies that without your organization there would be an unsolved problem or an unmet need.

If you are starting a program or project from scratch, you can arrive at your statement of purpose by making a needs assessment to determine exactly what is missing. Then you can write a purpose statement reflecting your desire to provide that which is missing. So the first step is to determine what the students need and what the community needs.

What do you do about an existing program? Many of us who work with student volunteers are thrust into leadership roles in established volunteer organizations and asked to give that organization direction and focus. We are handed an organization for which we have responsibility, and we must work toward the definition of its purpose without the hard data that a needs assessment would provide. Even so, the process must begin by defining the purpose of your organization, using what data you have and a lot of good sense.

The Value of a Purpose Statement

Preparation of a purpose statement is not simply an intellectual exercise. It has real value even apart from a Planning by Objectives system. For example:

- ° You may be surprised to find that your leadership have divergent ideas as to why your organization exists. These philosophical differences have resulted in conflicting efforts. By agreeing on a purpose statement, your organization gets all the hidden agendas out and begins to focus its activities. The result is less confusion and a greater sense of accomplishment.
- ° A statement of purpose can serve as your introduction to others and can be used in publications describing your work. It tells more about your organization than a list of all your activities and services because it tells why you exist, why you do what you do. Since it is timeless, its inclusion in printed materials does not date them.
- ° A statement of purpose is useful in seeking funds. Potential contributors can see at a glance whether your purpose is consistent with theirs.
- ° If you can state your organization's reason for being, you improve your ability to recruit new volunteers. People are usually attracted to groups whose members and leaders know why they are working together.
- ° As others understand your purpose, the number of requests for inappropriate help will diminish. If people understand that you are a short-term manpower service, they won't bother to call you for tutors or soccer coaches.
- ° Understanding your purpose enables you to develop criteria for choosing among the various projects you are asked to undertake, and you will be able to explain clearly and objectively your reasons for reaching a certain decision.
- ° Understanding your purpose increases your chances of doing a few jobs well rather than many jobs poorly.
- ° When you know why you are in business, it's easier to decide which groups to work with, to seek funding from, to co-sponsor events with.
- ° The development of a purpose statement and a clear understanding of the purposes of other organizations can help you avoid the unnecessary confusion and conflict issuing from alliances with people or groups whose purposes are in conflict with yours.

What It Does and Doesn't

A purpose statement does the following things:

1. It tells whom you serve--who your clients are.
2. It tells, in general terms, what you do for them.
3. It provides broad boundaries that indicate what you logically would do and would not do.
4. It tells why you are in business.
5. It goes on forever.

A purpose statement does not:

1. List specific activities--like tutoring, counseling, painting houses.
2. Mention time or set deadlines.
3. Tell how much will be done.
4. Serve as a goal or objective. It is something you head toward but can never fully achieve.

A purpose statement is a general, timeless statement that provides your organization with an on-going sense of direction. Conceivably, a statement of purpose could last your organization forever.

Here is an example of a well-written purpose statement:

"The fix-it-up-clean-it-up project provides free manpower services to low-income individuals and families in the greater metropolitan area so that they can maintain their homes."

It indicates who the clients are (low-income individuals and families in the greater metropolitan area) and indicates the general nature of the service (providing free manpower). It does not mention time. It does not tell what exact means are used in providing free manpower; it does not say specifically that the group paints houses and rakes yards. It does tell why the project exists.

Purpose statements can be written in any format. The format on the following page shows one way to write a purpose statement. If you find it helpful, use it.

The purpose of _____
(name of organization)
is to _____
(general nature of service)

for _____
(name or type of client)

Examples of Purpose Statements for Programs and Projects

Programs

- ° The Clearinghouse provides City University students with educationally valuable experiences through service to the community.
- ° The High School Involvement Program provides supportive services to high school student volunteer projects in the greater metropolitan area.
- ° The Volunteer Bureau seeks the alleviation of poverty through the efforts of student volunteers serving in poverty projects throughout the city.
- ° The service-learning program at West High School provides students with opportunities to learn through service to the community.

Projects

- ° Students and Seniors is designed to enable senior citizens to maintain their own homes as long as possible.
- ° SAP is designed to improve the reading skills of disadvantaged elementary school children of the area.
- ° The purpose of the Lincoln Heights recreation project is to offer varied recreational opportunities to the children of Lincoln Housing Project.

All of these statements meet the criteria for purpose statements. For example, the purpose of the service-learning program, as mentioned above, is to "provide students with opportunities to learn through service to the community." This explains why the program does what it does. If the purpose statement had said that the purpose of the program was to "place students in service roles in the community," the question would be, "Why is a school doing that?" The answer, missing in the statement, would be "because it provides students with opportunities to learn." The purpose statement has to answer the question, "why?" When it lists specific activities, it is not answering that question. Always check your purpose statement to make sure that it answers the question, "Why do you do what you do?"

Identifying a Purpose Statement

See if you can identify a statement of purpose. Check those statements that meet the criteria listed below:

<u>YES</u>	<u>NO</u>
<ul style="list-style-type: none"> ° Defines who the client is ° Gives the general nature of service ° Answers the question "Why?" 	<ul style="list-style-type: none"> ° Indicates time ° Mentions specific activities ° Begs the question "Why?"
_____ 1. REACH provides tutors to four area elementary schools.	
_____ 2. REACH is designed to improve the in-school performance of elementary school children in grades 2-6 of four elementary schools through the development of a close relationship between the child and a university student.	
_____ 3. The Clearinghouse recruits, trains, and places student volunteers in more than 30 volunteer projects.	
_____ 4. The Service-Learning Program facilitates the involvement of high school students in educationally enriching community service experiences.	
_____ 5. The purpose of Hospital Helpers is to provide individualized attention for long-term hospital patients.	
_____ 6. The purpose of Indoor Gardens is to provide physical activity for the hard-to-reach elderly patients at Extendicare through the medium of horticulture.	

- _____ 7. The purpose of Indoor Gardens is to get 15 men from Extendicare involved in gardening by June 1.
- _____ 8. The Smithsonian Heights Recreation project involves boys from a low-income housing project in weekly basketball clinics.

Which of these eight statements seemed like good purpose statements to you? We've listed our rationale for the right and wrong answers below. Check your answers and see how you did. If you got more than one or two wrong, you might want to re-read this section. Remember, this is difficult material; it gets easier as we go along, but you have to catch each step along the way.

1. NO: This tells exactly what the activity is (tutoring) rather than the general nature of the service. It leaves us asking "why tutor?" It doesn't identify very clearly who the client is. Which schools? Any four schools? All grades or specific grades? For a better purpose statement for this project, see example 2.
2. YES: It answers the question, "Why is the program in business and for whom?", without talking about specific activities. Note that a purpose statement does not need the word "purpose" in it, nor does it have to follow the format suggested.
3. NO: This lists the exact activities rather than the general nature of the service. It leaves us asking, "Why are you recruiting, training, and placing student volunteers?" It also tells how many projects. That's too specific for a purpose statement. It might not hold up in the future. For a better version of this purpose statement, see example 4.
4. YES: It is timeless, it indicates who the client is (high school students) and the general nature of the service (facilitating the involvement) without listing the specific activities. It tells why the program exists.
5. YES: It indicates the general nature of service (providing individualized attention) without listing specific activities such as visiting or providing reading materials. It is timeless and tells why the group exists.

6. NO: It is timeless and indicates the general nature of service and the client to be served. For an example of how not to write a purpose statement for this project, see example number 7.
7. NO: It gives numbers, is dated and is much too specific. It specifies the activity and makes us want to ask, "Why in the world would you want to have 15 old men gardening?"
8. NO: It does define the client, but it is too specific about the nature of the service. Why do you want to have kids from that project in basketball clinics? Are you trying to improve their ability to work in groups? Don't you want them to have a variety of recreational experiences? Why are you doing this?

Now you have the knack of identifying purpose statements. Try writing one for your own program or project in the space below.

PURPOSE STATEMENT

The purpose of _____
name of organization

is to _____
general nature (description) of services

for _____
client

Does it meet all of the criteria for a good purpose statement?

Problems, Pitfalls, and Traps

While purpose statements can be useful, they can also cause headaches. There are some pitfalls and traps to be avoided in the writing and use of purpose statements. Let's take a look at some of them.

Question: What if the purpose statement is so general that it lets you do everything but coin money or declare war?

Answer: It is useless. It sets no parameters for your organization. Rewrite it so that it gives some idea of your group's direction. It should clearly indicate your client and the general nature of your service.

Question: What if your purpose is too radical, or too conservative, or too broad for your school or your sponsor or your own boss? You don't dare have a written purpose statement then, do you?

Answer: If your purpose is antithetical to that of your sponsor, if it is in conflict with that of the organization you are part of or the people who run that organization, you'd best seek a new sponsor or modify your purpose so that your sponsor can accept it. It is inevitable that they will find out what you are in business for and will drop you.

Question: What if you really want to work with another group but your purpose seems to clash with theirs? Can't you work with them anyhow if everyone is willing to try it?

Answer: If your purposes are really different and in conflict with each other, any alliance would probably end with hard feelings. Frustrations always seem to result when groups with honestly divergent purposes try to link up. Better seek a more appropriate ally.

Question: What if your statement of purpose seems to require constant change?

Answer: Unless your organization is undergoing some kind of a major reorganization (which means it isn't the same organization it used to be) the purpose statement should serve you for a long time. If you are not going through a major change in direction and you still keep changing your purpose, you may be writing statements that are too specific or unrealistic. It may describe something that you aren't really interested in. It is possible your organization has outlived its usefulness and needs to be disbanded or re-organized around a new purpose. These are possibilities to consider, even if they are painful ones.

Question: What happens if I think up a purpose, and the rest of the group does not agree?

Answer: The design of a statement of purpose is one of those processes that needs everybody's input. Don't just spring your ideas on your co-workers. Get everybody to work on it.

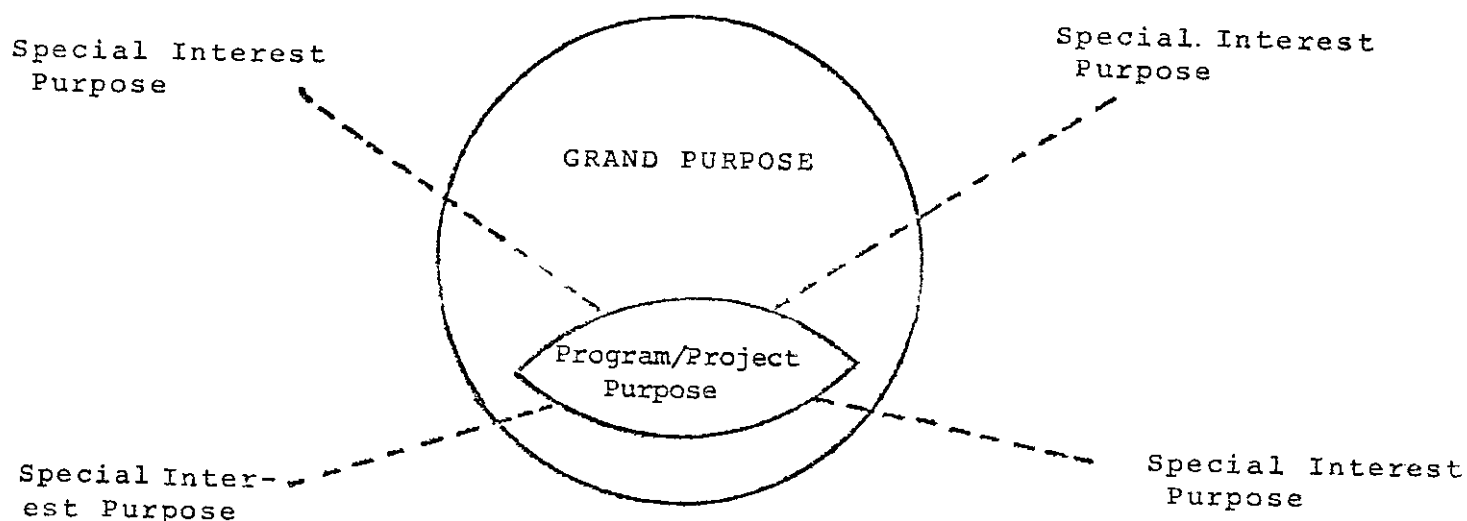
Two Other Purposes

Now you know what a purpose statement is. You've seen several examples. You've written a sample purpose statement for your own program or project. Now it's time to take a look at two other types of purposes that have impact on your work with volunteers. We call these "Grand Purposes" and "Special Interest Purposes."

A grand purpose is the purpose of a larger movement or organization of which your organization is a part.

Special interest purposes are complementary purposes which other groups associated with the larger movement (your allies) see as being the purpose of your organization and explain their reason for working with you.

Both the grand purpose and the special interest purpose are related to the purpose of your organization. The relationship can be illustrated like this:



The Grand Purpose

Take a look at the example of a volunteer program and the type of grand purpose that relates to it.

Take a school's Community Service Program which has as its purpose:

To provide educationally enriching community service opportunities to our students.

This Community Service Program is at once part of several larger, more expansive organizations or movements. It is a part of the school (which has its own purpose). It is a part of a movement toward experiential education (which has a purpose). It is part of the community's attempt to solve its own problems. It is a part of a movement to make area agencies more responsive to community input.

However, it owes its primary allegiance to one of these movements. In this example the Community Service Office decides that its primary allegiance is to the school of which it is a part--and which funds it. The purpose of the school is to:

Provide our students with the skills to become effective members of society.

This purpose of the school becomes the grand purpose of the Community Service Program.

So we see that the purpose of a program or project is a smaller part of a grand purpose--the purpose of the larger organization or movement of which it is a part. This means that the grand purpose of a specific volunteer project is the purpose of the whole volunteer program of which it is a part. For example, the grand purpose of a tutoring project is the purpose of the total volunteer program at the school.

Special Interest Purposes

Special interest purposes are those for which your allies think you are in business. For example, the Community Service Office receives cooperation, support, and resources from the Dean of Students, the Black Student Union, the School's Public Relations Office, the Career Planning Office, and the Alumni Office. Each of these has a special interest in the Community Service Office, a purpose for working with it, a reason that they think that office is in business. These special interest

purposes might be stated as follows:

Dean of Students: I help the Community Service Office because it provides an important, worthwhile activity for the students.

Black Student Union: We help the Community Service Office because it works for the elimination of racist behavior in area agencies.

Public Relations Office: We support the Community Service Office because the activities of student volunteers produce all kinds of good public relations for the school.

Career Planning Office: We co-sponsor activities with the Community Service Office because it provides an opportunity for students to test out career choices through volunteer work.

Alumni Office: We work with the Community Service Office because it generates goodwill and encourages alumni to donate money to the school.

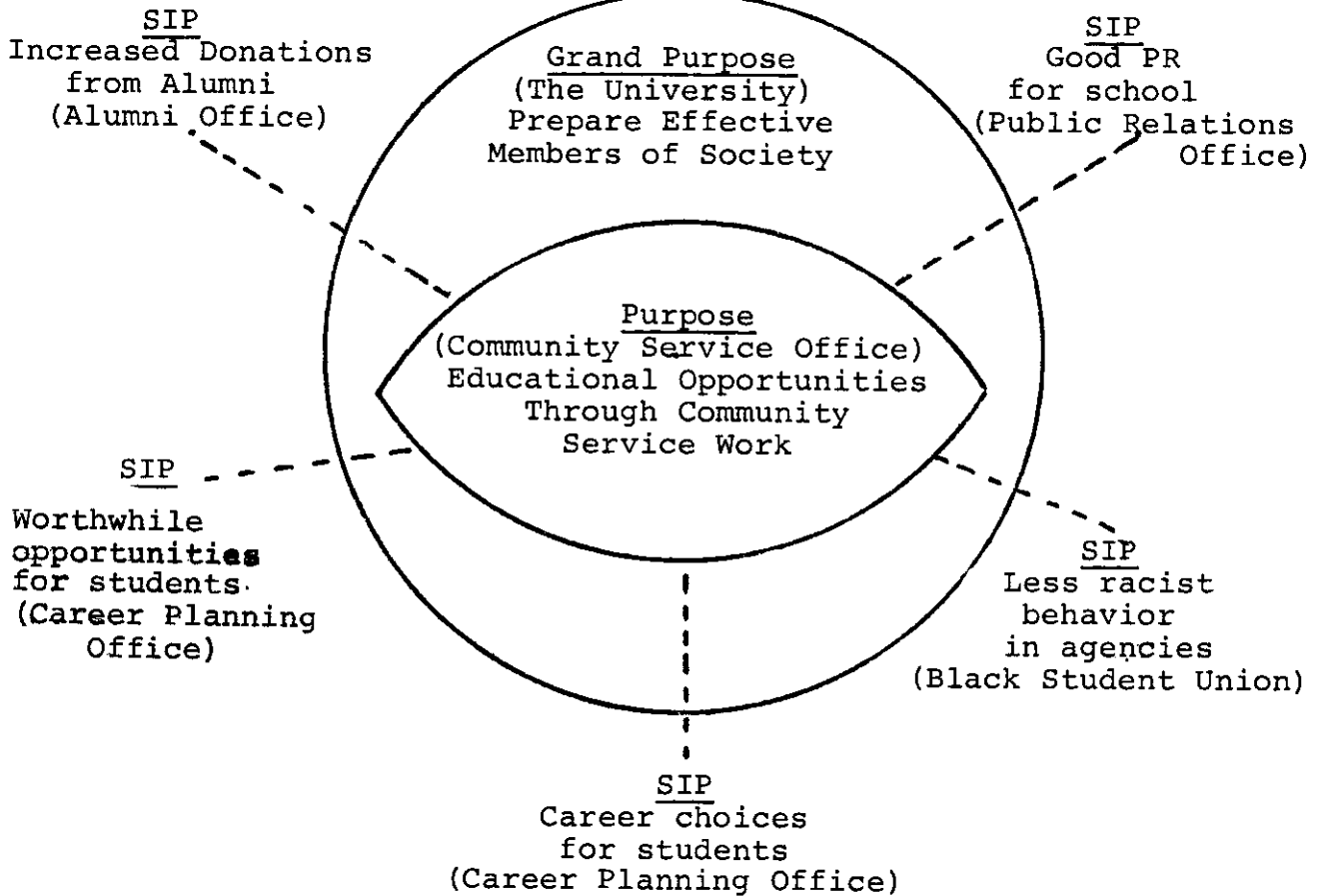
All of these people have special interest purposes for the Community Service Office. These special interest purposes are (in order):

1. To provide students with important, worthwhile activities.
2. To reduce racist behavior in agencies.
3. To generate good PR.
4. To help students choose careers.
5. To increase donations to the school.

These are not the reasons that the Community Service Office is in business. It is in business to "provide educationally enriching opportunities to students through community service work." But at the same time, if it is performing the five functions which the other groups wish it to do, that is all to the good. In other words, the special interests that the other groups expect from the Community Service Office are in no way in conflict with its own purpose. The alliances formed with these groups are on solid footing.

If we were to look back at our diagram of the relationship between the program purpose of this office, the grand purpose to which it relates and the special interest purposes which are attached to it, it would look like this:

Community Service Office



Indoor Gardens Project

Take a look at another example, that of a volunteer project, as opposed to a program, and see if you can identify the project purpose, the grand purpose, and the various special-interest purposes.

The Student Volunteer Corps at State College began an indoor gardens project two years ago. SVC started the project because it was consistent with its purpose of providing educationally valuable opportunities for students to serve the low-income people in the surrounding community.

The SVC provides the volunteer project with a variety of materials. They provide this support because the project attracts volunteers from the sciences, a department that produces few volunteers. The SVC wants its volunteers to come from a wide range of majors.

Indoor Gardens is staffed by ten student volunteers, all of them horticulture majors. The College's Horticulture Department provides technical assistance to the volunteers in the belief that the project is excellent practical experience for their students.

The project operates in a county old-age home whose residents are mostly long-term care cases. The students in the project were especially concerned that the elderly men at the institution had very few programs that interested them and that they get very little recreation. So they designed the program to attract those men. They figured that gardening would be something the men would enjoy and would also give them physical exercise.

The staff at the home was reluctant to allow the project to start, thinking that having volunteers at the home would mean more work for them, but they were finally convinced that this was a way of keeping the old men busy.

There were some arguments with some of the staff members who wanted the program to be offered on a first-come-first-serve basis rather than especially for the hard-to-reach elderly men. The volunteers finally won out.

After some initial problems, the staff at the home has grown enthusiastic about the project because the men really seem to enjoy it. Some men who have never taken part in anything at the home are enjoying it. One man who had not spoken in years has begun to talk again.

A local garden supply store has donated all necessary garden supplies in exchange for an occasional word of thanks in articles about the project.

The ladies' garden club of a nearby church has agreed to maintain the project when the volunteers are away on vacation. They feel that this is appropriate for them because it insures the continuity of a project which so effectively promotes gardening.

In the spaces provided on the following page, identify the project purpose, the grand purpose, and the special interest purposes that pertain to this example.

Project Purpose (The reasons the project exists.)

The purpose of the Indoor Gardens project is to _____

for _____

Grand Purpose (The purpose of the larger organization of which the project is a part.)

Indoor Gardens is a part of _____
whose purpose is to _____

for _____

Special Interest Purpose

The article talks about several groups and organizations that are working with the ten volunteers on this project and gives the reasons for the various groups' interest. Each of them has a special interest purpose for the project, a reason that they support it. List those purposes below:

(Name of group) _____ sees the purpose of
the Indoors Gardens project as _____

for _____

(Name of group) _____ sees the purpose of
the Indoor Gardens~Project as _____

for _____

(Name of group) _____ sees the purpose of
the Indoor Gardens Project as _____

for _____

(Name of group) _____ sees the purpose of
the Indoor Gardens Project as _____

for _____.

Your answers should be something like this:

Project Purpose: The purpose of the Indoor Gardens project is to provide recreational activity for hard-to-reach elderly men at the old-age home, through the medium of horticulture. (Note: it's timeless, general, doesn't list activities, names clients, tells why they are in business and gives general parameters.)

Grand Purpose: Indoor Gardens is a part of the Student Volunteer Corps whose purpose is to provide educationally valuable opportunities for students to serve the low-income people in the surrounding community.

Special Interest Purposes:

1. The Horticulture Department sees the purpose of Indoor Gardens as providing valuable experience in horticulture for its students.
2. The old age home's staff sees the purpose of the project as providing activities for the elderly men without making more work for themselves.
3. The garden supply store sees the purpose of the project as promoting interest in gardening and generating good public relations, thus generating more business for them.
4. The Ladies' Garden Club sees the purpose of the project as promoting interest in gardening.

None of these special purposes is in conflict with the purpose of the project.

Suppose, however, the special interest of the old age home's staff was to provide lots of potted plants for sale, and the men couldn't grow the plants as fast as women residents. As a result, the staff insisted that the women, rather than the men, be involved in Indoor Gardens. That special interest purpose would be in conflict with the purpose of the project. The volunteers would either have to change the ideas of the staff or seek a new place to run their project.

If, in their publicity, the students never mentioned the garden supply store and in no way promoted gardening, the store would probably soon cease to provide them with free materials.

So special interest purposes need to be in harmony with the project or program purpose--or there will be conflict between the project and some of its supporters. The project needs to make sure that it fulfills those special interest purposes so that those groups will continue to provide support.

Think about the special interest purposes that your allies have for you and make sure that they are generally compatible with your program or project purpose. Suppose, for instance, that the purpose of your high school tutoring project is "to increase the reading skills of third graders at Jones Elementary School so that they perform better in school." You are working with a community group whose purpose is to "provide individual instruction for the children of that school." There is no conflict; you can improve the children's performance in school and also provide individual instruction. The group's special interest purpose does not conflict with your project purpose.

On the other hand, suppose that you join forces with a group that wishes to improve instruction at the school by the immediate removal of the principal. That group sees your purpose as "making it possible for the students to perform better by helping to remove the principal." The principal may need removing, but if you try to work with your ally for the principal's removal, it may be you rather than the principal that goes. The ally can work without being in the school, you can't.

The ally's special interest purpose for you is in direct conflict with your project purpose. The result is instant and sustained frustration for both groups. In such a situation it is best to sever the alliance. Special interest purposes must be compatible.

Practice On Your Project

Now it's time for you to work on your own program or project again. You wrote a purpose statement for your organization. Now go to work on identifying the grand purpose to which that relates. Ask yourself the purpose of the larger unit or institution or movement of which your organization is a part. Your organization may be a part of several such larger entities, but you are more related to one than to the others. (It usually is the one that pays the bills.) Choose the one movement or organization to which you feel primary allegiance. For instance a volunteer clearinghouse may be part of:

- ° the school's office of student affairs
- ° the experiential education movement
- ° the career education movement
- ° the fight against racism
- ° the war against poverty
- ° the high school curriculum

A specific project, like a tutoring project, may be part of:

- ° the volunteers in schools program
- ° individualized education in the school
- ° the school's community service program

Even after you identify the movement or organization to which you feel primary allegiance, you may have to scout around to find out its purpose (and hence your grand purpose). It may or may not be stated. It's worth identifying because it gives you a much clearer notion of how you fit into the scheme of things.

Grand Purpose

_____ is a part of
 (name of your organization)

_____ whose purpose (and
 (the larger organization)

thus, our grand purpose) is to _____

for _____

Remember that the same criteria apply to a grand purpose that apply to a program or project purpose, but the scope is greater.

Finally, define the special interest purposes that attach themselves to your program. Your support (financial, manpower, moral) comes from various sources. Identify those. Perhaps you will include student government, community agencies, other student groups, academic departments, the school's VIPs, the clergy, the career center, or individual counselors and teachers. Each will have a special interest purpose (stated or hidden) for your organization. It will reflect their purpose and their reason for supporting you. Be sure that these special interest purposes are consistent and compatible with the purpose of your organization.

_____ sees the purpose
(name of group)
of _____ as _____
(your organization)

_____ for _____

_____ sees the purpose
(name of group)
of _____ as _____
(your organization)

_____ for _____

_____ sees the purpose
(name of group)
of _____ as _____
(your organization)

_____ for _____

_____ sees the purpose
(name of group)
of _____ as _____
(your organization)

_____ for _____

Throughout this section of the manual, by defining the purpose of your project or program and clearly identifying the grand purpose and the special interest purposes, you have begun to use the system of Planning by Objectives. You have mastered the first of its four elements.

If you are reading this manual on your own without involving other members of your organization, consider your work here as practice--as a testing of the system and of your understanding of it--as a means of learning about the system so you can involve others in it.

If a group from your organization is reading this manual, the statement of purpose and the outline of grand and special interest purposes that you have just completed is the start toward implementation of Planning by Objectives for your group.

SECTION III

P B O E L E M E N T 2 -- L O N G T E R M O B J E C T I V E S

The second element of Planning by Objectives is setting long-term objectives (LTO's). LTO's are statements of targets you wish to hit, accomplishments to be achieved at some time in the future. LTO's grow out of your purpose statement. They are concrete statements of what you wish to accomplish in the realization of that purpose.

There are two basic types of objectives: client-centered objectives and organizational-centered objectives.

Every organization needs both types. Client-centered objectives are statements of what is going to be accomplished in serving the clients. Organizational-centered objectives are statements of what kinds of organization building and resource gathering are necessary to provide those services to the clients. Organizational-centered objectives are "in order that's." For example, we are going to have three busses by January of next year, in order that we can get more volunteers to clients and so better serve them.

Both kinds of objectives (client-centered and organizational-centered) must meet certain criteria. Objectives must be:

1. Feasible -- Objectives must be feasible, possible, and reasonable. Your experience or the advice of others must suggest that they can be accomplished.
2. Dated -- The objectives must be set within a time-frame that indicates an end date by which time something is to be accomplished.
3. Measurable -- You must be able to tell whether or not you've hit your target. Usually the objective itself suggests the specific means of measurement.
4. Indicative of an Acceptable Level of Achievement -- They tell exactly how much of the desired result must be achieved to consider the effort successful (Three out of four; 85 percent).

Here are some examples of objectives--some client-centered and some organizational-centered. All meet the four criteria stated above.

Client-Centered Long-Term Objectives

Seventy-five percent of the children in grades 1-3 of Jones Elementary School will be reading one grade level above their present reading level after six months of tutoring.

Half of the children in Mt. Morris Housing Project will be participating in the after-school recreation project by January 1.

At least 15 senior citizens will be participating in the Indoor Gardens Project by May 1.

Organizational-Centered Long-Term Objectives

By January 18, we will have recruited 50 male volunteers to be tutors.

By June 15, we will have purchased three eleven-passenger vans to be used in the transporting of volunteers.

Half of our student volunteers will have participated in the program for at least three semesters by the end of next year.

Note that each of these last three, the organizational-centered objectives, has an understood "in order that we can better serve the client" at the end of it.

Writing Client-Centered Objectives

Client-centered objectives are not easy to write, but it is really a matter of following three basic steps.

- Step I. Note what your purpose statement suggests is needed--what problem is to be solved.
- Step II. Explain what part of the need you wish your organization to handle. This can be a general, conversational, imprecise statement. Just try to explain what part of what's needed you plan to provide.
- Step III. Translate Step II (your wish) into long-term objectives--more precise statements of what you wish to accomplish. These objectives must meet the criteria listed.

Try those three steps on a specific example. Turn back to the example of the Indoor Gardens project. The purpose of that project is:

To provide recreational activity for the hard-to-reach elderly men at the old-age home, through the medium of horticulture.

STEP I. What does this purpose statement suggest is needed, or missing? What's needed seems to be sufficient recreational activity for elderly men at the home. That seems to make sense.

STEP II. What part of what's needed do you wish to provide? Do you want to have all the men involved all the time in recreational activity? How many of the elderly men do you wish to involve?

You decide that you want at least half of the old men to be involved in your recreational program at least once a week. That's the part of what's needed that you want to provide. And you want as many as possible of them to be "hard-to-reach," -- people who don't take part in any other recreational activity at the home.

STEP III. Now it's time to write that wish in the form of one or more objectives that are feasible, dated, measurable, and indicate an acceptable level of achievement. Your objectives might look like this:

1. Within a year, at least 50 percent of the male residents of the old-age home will be participating in our recreational program at least once a week.
2. A year from now, more than half of the participants will be people not participating in any other recreational project at the home.

So the purpose statement of Indoor Gardens has yielded two client-centered long-term objectives.

Writing Organizational-Centered Objectives

Now we turn to organizational-centered long-term objectives. Your experience, common sense, and advisors suggest to you that to reach these goals, you must have: (1) indoor gardening facilities and (2) volunteers. You translate these organizational needs into statements of how much of each you wish to have at what time. You decide that you want indoor gardening facilities for at least 10 people at a time, and you need at least 20 volunteers. So you write this in terms of objectives that are feasible, dated, measurable, and indicate an acceptable level of achievement.

1. By January 1, we will have at least 10 wheelchair-height gardening flats and the necessary plants installed indoors in the old-age home.
2. By September 1, we will have recruited and trained at least 20 volunteers, 50 percent of whom will be horticulture majors, and all of whom will have had prior gardening experience.

From the original purpose statement, we have derived four long-term objectives--two of them client-centered and two of them organizational-centered. In summary, the process for moving from the purpose statement through long-term objectives is to:

- STEP I. State what is needed in your purpose statement.
- STEP II. Indicate what part of what's needed you wish to provide in serving the client.
- STEP III. Translate that wish into client-centered objectives.
- STEP IV. Note the organizational needs indicated by the purpose and the client-centered objectives.
- STEP V. Translate those needs into organizational-centered objectives.

Objectives for a Program

Let's take another example, this time a volunteer program rather than an individual project. The Community Services Program at State University has as its purpose:

To provide university students with educationally valuable experiences through community services.

STEP I.

What does this suggest is missing in meeting the needs of the clients--in this case the university students?

1. It suggests that currently there aren't enough opportunities for students.
2. It suggests that opportunities aren't educational.
3. It suggests that all university students should have a chance to serve.

STEP II.

So what part of what's needed do you want to provide? You decide that you will have accomplished something worthwhile if a year from now any student from any educational major at the University can serve the community in a way that is educationally valuable as indicated by the choice of a placement related to his major. You further decide that if a lot of the people you place are doing this work for a course or are referred by a professor you can be sure that the work is academically valuable.

STEP III.

You translated this wish into long-term objectives that are feasible, dated, measurable, and indicate an acceptable level of achievement. They might read like this:

1. A year from now you will, at all times, have at least three placements available that relate to each major at the University.
2. A year from now you will have at least three placement options for each student who wishes to volunteer.
3. A year from now at least 40 percent of the students you place will choose placements related to their majors.
4. A year from now at least 50 percent of the students you place will be referred by a faculty member or will be doing their work in relation to a course.

There you have four client-centered (the client in this instance is the student) long-term objectives that come logically out of the purpose statement of the volunteer program.

STEP IV.

What kind of organizational-centered long-term objectives might these client-centered LTO's and the purpose suggest? Let's say that CVS currently has only one placement for each student who comes in, and it has no science and business placements. Currently only 25 percent of its referrals are coming from faculty.

STEP V.

Under these circumstances, the long-term organizational-centered objectives will read:

1. Eight months from now we will have doubled the number of placements available to students.
2. By eight months from now we will have at least 60 placements each in the areas of science and business.
3. By ten months from now we will have met with at least 80 percent of the academic department chairmen to explain the opportunities available to their students through the program.
4. By a year from now, we will have our placements filed according to majors.

Back to Your Program

Now go to work again on your own program. You have already written a purpose for your organization. Rewrite it here:

The purpose of _____ is
to _____

for _____.

STEP I. What does this statement suggest is needed?

1. _____

2. _____

3. _____

STEP II. What part of the client's needs can you fill with your service?

STEP III. Write those wishes in the form of client-centered objectives that are feasible, dated, measurable, and indicate an acceptable level of achievement.

1. _____

2. _____

Now try the organizational-centered long-term objectives.

STEP IV. What is your organization going to have to do in order for you to realize your purpose and meet your client-centered objectives?

STEP V. How many of these things are you going to need and when? Write those target organizational needs in terms of objectives (feasible, dated, measurable, and indicative of an acceptable level of achievement).

1. _____

2. _____

3. _____

Consider that as just a practice exercise. There is still a lot more to learn about writing long-term objectives.

Taking A Closer Look

Here's an example of a well-written objective. Look at the way it meets the criteria.

Six months from now, the Helping Hands project will be providing free moving service to 90 percent of the low-income families who request that service, within at least two days of the day they wish to be moved.

1. Feasible -- If at this point, the students are moving 75 percent of the people requesting service within two days of the time that they request the service, and if the group has money to lease an additional van and the expectation of recruiting an additional 50 volunteers, it seems feasible that this could be increased to 90 percent.
2. Dated -- This will be accomplished six months from today.
3. Measurable -- You can count the number of families requesting the service, note how many were moved within two days of the time they requested, and end up with a percentage figure.
4. Indicative of an acceptable level of achievement -- The objective indicates that the service must be provided to at least 90 percent of those who request it within at least two days of the time they wish to be moved, in order to consider the objectives accomplished.

These four criteria apply to all objectives of all kinds, whether client-centered objectives or organizational-centered.

The actual length of time for the completion of a long-term objective depends on the life span of your program or project. A long-term objective should be attainable while the people currently involved in the organization are around. However, if your ultimate objective will take five years to reach, you can still tackle it by using long-term objectives. For instance if your long-term objective is that five years from now 95 percent of your volunteers will have been active for at least two semesters, this can be broken into reasonable segments. It might state that a year from now 35 percent of the volunteers will have been active for at least two semesters. Then, a year from now you write a new long-term objective for the following year which indicates that you want 50 percent of the volunteers to have been involved for at least two semesters. What you are doing is sneaking up on that far distant objective. This way, each year's group of leaders will have a target that can be achieved while they are still in school.

Test Yourself

Below are several long-term objectives. Some of them are client-centered and some organizational-centered. Read them over and check those you think meet the criteria for long-term objectives.

1. One year from today we will have developed and implemented a student volunteer project providing hospital orientation for all children admitted to Children's Hospital between the hours of 8 am and 6 pm, Monday through Friday.

2. To provide a recreation program twice a week for children between the ages of six and 15 who live in the Jonesville Housing project by six months from today.

3. To tutor children in reading at Central Elementary.

4. To have more committed volunteers by a year from now.

5. A year from now 50 percent of our volunteers will have been active in their project for at least four months.

6. To have increased services to the elderly during the next six months.

7. To have increased by 50 percent the number of elderly served in their homes a year from now.

8. By a year from today the number of male volunteers in the Volunteer Probation Officer Program will have increased by 75 percent.

9. By a year from today, to have trained 100 volunteers in basic tax skills needed to provide aid to low-income families.

10. To have published three issues of a volunteer newspaper a year from today.

11. By a year from now to have raised at least one million dollars for our student volunteer program.

We've given our answers below, along with our reasoning. If you missed more than one or two answers, reread the last few pages about the nature of objectives. It is important that you understand what makes a good objective.

1. YES: Feasible--seems so. Dated--one year from today. Measurable--it's either in operation or it's not--that's certainly measurable. Acceptable level of achievement--all children admitted between 8 am and 6 pm Monday through Friday.

2. YES: Feasible--seems so. Dated--six months from today. Measurable--twice a week. Acceptable level of achievement--at least twice a week for the children between six and 15.

3. NO: Feasible--it would seem so. Dated--no. Measurable--no. Acceptable level of achievement--no. How many children? How often?
4. NO: Feasible--seems so. Dated--a year from now. Measurable--no. How do you measure committed volunteers, what's the yardstick? Acceptable level of achievement--no. How many committed volunteers is acceptable to you? (See example 5 for a possible rewrite of this.)
5. YES: Feasible--seems so. Dated--yes. Measurable--yes--a percentage. Acceptable level of achievement--yes. At least 50 percent for at least four months.
6. NO: Feasible--seems so. Dated--no. The duration is indicated, but there is no end date. Measurable--yes. You can count the number of services or the number of people served. Acceptable level of achievement--no. How much of an increase is enough? One percent? Fifty percent?
7. YES: Feasible--seems so. Dated--yes, a year from now. Measurable--yes a percentage. Acceptable level of achievement--yes, 50 percent served in their homes.
8. YES: Feasible--yes. Dated--yes. Measurable--by percentage. Acceptable level of achievement--yes, a 75 percent increase.
9. YES: Feasible--yes. Dated--yes. Measurable--yes, by counting (for the number), by testing (for the skills). Acceptable level of achievement--yes, at least 100 volunteers will have a skill level such that they can help lower income people with their tax forms.

10. YES: Feasible--yes. Dated--yes. Measurable--yes, you can count the issues. Acceptable level of achievement--yes. Three issues.
11. NO: Feasible--no. At least not in our experience. Dated--yes. Measurable--yes, you can count the money. Acceptable level of achievement--yes, you are to have at least a million dollars.

Foggy Targets

Sometimes a program has unstated or unwritten long-term objectives. Its objectives are vague, poorly defined, foggy. Here are some examples:

- ° to have varied projects;
- ° to have committed volunteers;
- ° to provide a real service to the community.

One of the most difficult tasks that may face someone working with volunteer programs is translating those hazy, unwritten wishes into well-defined long-term objectives and thereby increasing the likelihood that the organization will achieve its objectives. What do you do with such foggy targets? The key is to ask questions--the right ones. Here's a question and answer session using one of the examples above. You are the consultant.

PROGRAM STAFF:

Our long range objective is to have varied projects.

YOU:

So you want to have varied projects. What do you mean by varied?

THEM:

We mean lots of different kinds of projects.

YOU:

How many is lots?

THEM:

Well, it's not really so much a matter of how many as it is a wide variety.

YOU:

How can you tell when you have a wide variety?

THEM:

You probably have a wide variety if you can place most of the students who come into the office. And if you are attracting volunteers from a wide variety of majors.

YOU:

Would you consider it a victory if you could place 75 percent of the students who come into the office?

THEM:

No...we do that now. We should be able to place 95 percent of the students who come in.

YOU:

OK, so that gives us one means for measuring whether or not you have a wide variety of projects; "You will be able to place 95 percent of the students who come in." When do you figure you should be able to be performing at this level?

THEM:

Probably by a year from now.

YOU:

How's this for an objective:

A year from now we will be able to place 95 percent of the students who come to us for a volunteer experience.

- - - - -

What you've just done is gone through the process of translating undefined, imprecise goals into a well-written long-term objective.

Project Leaders Meeting

Test this skill on your own. Here is an informative discussion among members of a volunteer project. Listen in and see if you can translate some of the wishes that the students have for their program into long-term objectives.

JOHN:

Somehow this tutoring project isn't getting many male volunteers. We've got a lot of boys who need tutoring --and who I'll bet would do better if they were working with guys instead of girls.

SUE:

I agree. But how do we get more guys? It seems like we've always had this problem.

GENE:

I'll bet if we got some guys in the program to do recruiting, we'd get more. As it is now, we've always got eight or ten little fellows matched with girl tutors--and that's not so cool.

SUE:

It seems to me that we have a more important problem than that. What are we going to do about drop-outs? Our volunteers don't seem to take their work seriously. They drop out, don't show up. The school is getting kind of fed up. What are we going to do?

WALLY:

We need people who are committed.

SUE:

What do you mean committed?

WALLY:

Well, I guess I mean that they stick it out for at least a semester. I guess that means they are committed --and they show up.

SUE:

Right! So where do we find them?

WALLY:

I don't know, but we've got to do something. Maybe if we gave them better training, or if they had more contact with the teacher so they knew how their kid was doing. I don't know what the answer is.

BETH:

I hate to change the subject, but time is short and I think you all should realize that this is my last semester here and come next fall I go off to college. You're going to need a new project leader. Got any ideas?

JOHN:

I didn't know that you were graduating, Beth. Where are we going to find someone who knows all that you do about this project? We've only got six months until next fall. What should we do?

In the space below, write long-term objectives for what you see as the major needs of this high school project in the months ahead. Remember, make them feasible, dated, measurable, and make sure they indicate an acceptable level of accomplishments.

You are acting as a consultant to help this group solve its problems, so there are no right or wrong answers, as long as your long-term objectives meet the established criteria.

OBJECTIVE I.

OBJECTIVE II.

OBJECTIVE III.

Here are some long-term objectives that other people who work with high school student volunteer programs extracted from this discussion. You might want to compare yours with theirs.

1. A year from today, we will be able to match all first to fourth grade boys referred to the project with male tutors by the third week of the semester.
2. A year from today the number of tutors who stay in the project at least one semester will have increased by 50 percent.
3. Six months from today, we will have chosen, trained, and placed on the job, a new project leader.

Were your long-term objectives for this example anything like these? If you wrote more than three long-term objectives, you may have written some short-term objectives. Those are objectives that contribute to the long-term objectives. Don't let that worry you--we'll be getting to short-term objectives soon. Note that there are two kinds of objectives in this case; the first one is a client-centered objective, and the last two are organizational-centered objectives. If this confuses you, check back for a review.

Practical Values

Before starting to work on your own project objectives, take a look at the practical value of long-term objectives and some of the pitfalls.

1. It is in the nature of things that we spend most of our time worrying about what needs to be done tomorrow, the next day, by the end of the week. Long-term objectives keep us thinking beyond the day-to-day grind.

2. A lot of things that seem unchangeable really are not. They're just problems that need attention over a long period of time. Setting long-term objectives helps you to focus on those problems and begin solving them.

3. Long-term objectives get us into the habit of clearly defining desired states, like more money, committed volunteers, better leadership. As soon as we have defined what we mean by these foggy, imprecise wishes, and have translated them into objectives, the likelihood of our accomplishing them increases greatly.

4. Long-term objectives give us confidence that we can change things; that things need not be the same every

semester. They give us causes around which to organize our day-to-day activities.

5. Objectives automatically indicate the method for evaluation so that evaluation isn't a last minute thing. Often evaluation is the weakest part of student community service work. Our intentions are good, but somehow, when the end of the year comes, we don't have the time or the money or the manpower to do a thorough evaluation of our program. If that is true, it is likely that we have neglected to collect the data we need to evaluate. Objectives enable us to build evaluation into our plans from the beginning. They help us articulate what we will measure, how we will measure, and how much is needed for victory. By writing objectives we have taken the major step toward evaluation.

Traps, Problems and Misuses

Even people who are accustomed to working with objectives can make mistakes in the use of them. People who are working with them for the first time have many traps to avoid. Here are a few of those problems. If you recognize them, perhaps you can avoid them.

1. Sometimes people set long-term objectives with target dates that are too far in the future. No one is likely to be around when the objective is accomplished. That tends to dampen people's enthusiasm for working toward the objective. If you have an objective that will take five years to accomplish, cut it up into five chunks.

2. Occasionally, in trying to make sure that the objective is measurable people get carried away and indicate a much more intricate means of measurement than is needed. Sometimes that measurement gets in the way of serving their client. Let's say that a project wants to determine whether or not it is reaching a certain percentage of the hard-to-reach elderly (as in the case of the Indoor Gardens project). They might write that they wish to have a certain percentage of the hard-to-reach elderly, as defined by a questionnaire to the staff in which each staff member indicates whom they consider to be hard-to-reach, and each patient is scored on how many hard-to-reach votes he gets. An easier method is to simply conclude that hard-to-reach clients are those that are not involved in any of the home's activities. You can measure the number of hard-to-reach clients by counting those in the program who are involved in no other activities in the home. Always look for the simplest possible means of measuring what you are looking for. If you want to measure commitment of volunteers, you might give the volunteers an elaborate

testing device in which they are scored on a commitment scale. Or you might simply conclude that if a volunteer stays with a project for at least two semesters, you consider him committed. Then all you have to do is keep track of how long volunteers have been active and you have a commitment index. The rule is to keep it simple. The use of objectives should not require that you be a full-time social science researcher.

3. People can get equally carried away with elaborate schemes for indicating the level of acceptable achievement. Let's say that a project has as an organizational-centered long-term objective that "by a year from today, we will have written, edited, and distributed to our volunteers, at least four issues of a newsletter of at least six pages an issue and containing a minimum of eight stories on volunteers in corrections, with mention of at least 15 specific volunteers." The objective has overstated the minimum level of achievement. Note that the means of measuring is counting--that's simple enough--but the indication of acceptable level of accomplishment is overdone. The writer of the objective has locked himself into a very specific type of activity for a year. It would be enough to state that the newsletter be written, edited, and distributed and that there be at least four issues of a newsletter by a certain date. The minimum level of acceptable achievement is to indicate the nature of a victory--not to prescribe every aspect of it.

4. What happens when a long-term objective is not reached? Sometimes, when this happens, people get discouraged without realizing that they have accomplished a lot along the way. Their lack of success may be due to an objective set too high, to unforeseen circumstances, or a reduction in resources. If your service-learning project has not met one or more of its objectives, don't give up. Take a look at the reasons you fell short, evaluate your accomplishment realistically, and then rewrite the objective in a more feasible manner for the future.

5. From time to time, people set too many long-term objectives and therefore accomplish none of them. Make sure you aren't overly optimistic about the number of things you can be concerned about at once. Keep in mind the chart of PBO, which shows the proliferation of short-term objectives and planning details that derive from a single long-term objective. Remember, that a long-term objective is not a thing in itself. It begets short-term objectives, each of which in turn begets planning details.

6. Some people are resistant to PBO, saying that by objectifying things, by making them measurable, you are de-humanizing a very human business. This is an understandable concern. But in a real sense, the use of objectives

makes our programs and projects more humane. Objectives force us out of our cloud of generalized good feelings about what we're doing and force us to ask whether or not we are really accomplishing anything for our clients. If we are concerned about service to the client, the asking of such questions should be important to us.

For example, a group of students resisted writing objectives for their project because the only outcome they really wanted was that "the client be happy with the service." We've got no quibble with that as an indicator of the quality of the service, but how do you know when the client is happy? There might be a long-term objective which gets at that issue of client satisfaction so that you can really tell if there is satisfaction. Begin to ask questions like, "How can you tell if clients are satisfied?" Answer: "They refer their friends to the program." Now we can define client satisfaction as "75 percent of the clients in our project a year from now will have been referred to the project by a friend."

The seemingly unmeasurable is always measurable if you can ask the right questions about what the person means by that unmeasurable value. By making it measurable, by insuring that we can tell when we have the desired effect, we are insuring that the client is really served and that we are not deluding ourselves about the value of our work.

Your Program Once More

We've talked about how you move from the purpose statement of your organization to the writing of long-term objectives. And we have talked about the qualities of a good objective. We've looked at examples of objectives, and you have learned to identify long-term objectives. Now it's time for you to go back to work on your own program or project. You have derived some client-centered and organizational-centered long-term objectives from your purpose statement. Refer back to pages 30 and 31 to review them. Then rework each until you are sure it meets the criteria of a good objective; i.e., feasible, dated, measurable, and indicates an acceptable level of achievement.

Long-Term Objectives (rewritten)

1. _____

2. _____

3. _____

4. _____

5. _____

Now you have five long-term objectives. Check them to make sure that they are feasible, dated, measurable, and indicative of an acceptable level of achievement. Using the forms provided below, for each objective, indicate how each objective meets these four criteria:

Objective 1.

1. Feasible, why? _____

2. Dated? _____

3. Measurable, how? _____

4. Acceptable level of accomplishment? _____

Objective 2.

1. Feasible, why? _____

2. Dated? _____

3. Measurable, how? _____

4. Acceptable level of accomplishment? _____

Objective 3.

1. Feasible, why? _____

2. Dated? _____

3. Measurable, how? _____

4. Acceptable level of accomplishment? _____

Objective 4.

1. Feasible, why? _____

2. Dated? _____

3. Measurable, how? _____

4. Acceptable level of accomplishment? _____

Objective 5.

1. Feasible, why? _____

2. Dated? _____

3. Measurable, how? _____

4. Acceptable level of accomplishment? _____

You have now mastered the writing of good objectives and have written some long-term objectives for your own program or project. The skills which you have learned here are the same ones which you will be using in the next section on short-term objectives. So you are well on your way to mastering the Planning by Objectives system.

SECTION IV

ELEMENT 3 -- SHORT TERM OBJECTIVES

Short-term objectives have all the characteristics of long-term objectives, except that they are in a shorter time frame. They contribute directly to long-term objectives. If, for example, a long-term objective of a health program is that "a year from now, 70 low-income families will be receiving free health care on a once-a-month basis," a short-term objective (client-centered like the LTO) might be that "three months from now, we will have interviewed 100 potential client families, explained the planned services, and signed up at least 50 of those families." The short-term objective is a stepping-stone toward the accomplishment of a long-term objective.

Let's look at an organizational-centered long-term objective: "One year from today, we will have 100 volunteers trained and working in the health project."

A short-term objective (also organizational-centered) that might contribute to the accomplishment of this long-term objective would be:

"Six months from today we will have recruited at least 150 volunteers with some experience in the health field or an interest in a career in the health professions."

It is impossible to talk of short-term objectives without taking into account the long-term objectives to which they contribute--just as it is impossible to talk of long-term objectives without reference to the purpose to which they adhere. Take a look at the process by which one moves from a long-term objective to the defining of short-term objectives.

The Volunteers in Community Service (VICS) Program has set as its long-term organizational-centered objectives:

"We will have at least two nine-passenger vehicles available to transport students to projects at least six evenings a week by six months from today."

The VICS leaders noted all the factors that could contribute to their reaching the long-term objective. For instance:

1. They have one van, but it has no seats so it's not good for transporting people.
2. They have extra money, but they need student government permission to spend it on vehicles.
3. They have an old, unreliable 44-passenger bus, but it is too big to use for their projects of 5 - 10 people, and you need a chauffeur's license to drive it.
4. They don't know the relative costs of buying and leasing vehicles.
5. They'll need to have insurance, plates, etc.

These factors which affect their achieving their long-term objectives, are translated to short-term objectives which:

- ° Contribute directly to the long-term objectives;
- ° Are feasible;
- ° Are dated within a time frame shorter than the long-term objective to which they contribute;
- ° Are measurable;
- ° Indicate an acceptable level of achievement.

So, the short-term objectives that contribute to the long-term objectives that "we will have at least two 9-passenger vehicles available to projects six evenings per week by six months from today," might be:

1. One month from today, we will have secured a written statement from SGA, indicating how much of our current budget may be spent on transportation.
2. Two months from today we will have installed seating for nine passengers in our old van.

3. Two months from today we will have secured written estimates of the costs of:
 - a. Leasing a 9-passenger van for one year--evenings only, and full time.
 - b. Buying a new 9-passenger van.
 - c. Buying a used 9-passenger van.
4. Three months from today, we will have auctioned off the old 44-passenger bus.
5. Three months from today we will have decided between leasing and buying the second vehicle.
6. Four months from today we will have selected the new vehicle.
7. Five months from today we will have purchased or leased the new vehicle and completed all details of ownership including insurance, plates, etc.

Each of these examples of short-term objectives:

- °directly contributes to the long-term objectives
- °is feasible
- °is dated (and is a less-distant date than the LTO)
- °is measurable--you can tell when it's done
- °sets a level of acceptable achievement

Let's look at another example. A group of students runs an income tax project for low-income people every year from January 1 to April 30. The purpose of this project is:

To provide the city's low-income people with an accessible, reliable, and technically proficient free tax service.

The group agrees to this purpose statement and decides that the needs which it implies are:

1. Need for a free tax service.
2. Many clients can't get to existing tax services-- need for locations that are accessible.
3. Need for a service that is reliable--that operates when it says it will.
4. Need for a program in which the volunteers are competent and don't make mistakes.

The group focuses on one of those needs--number 4, for instance. The volunteers need to be good at filling out the tax forms. They need to be technically competent. By technically competent the volunteers agree that they mean that "98 percent of the tax forms completed by the volunteers will be correct." Then the long-term objective of the tax project becomes "by the close of this year's tax project (on April 30), 98 percent of the client tax forms will have been correctly completed."

The long-term objectives have been defined. Now the group needs to derive the short-term objectives that will result in the LTO being accomplished. The group decides that in order for the LTO to be accomplished, they need volunteers that are:

1. Well trained
2. Already technically proficient when recruited
3. Able to call an expert or use other resources for help if they don't know the answer themselves.

So the group writes the following short-term objectives:

1. By five months from today, all the tax volunteers will have completed 10 hours of training with the IRS.
2. We will have recruited 25 volunteers by four months from today.

3. We will have a telephone in each tax center, which volunteers can use to reach consultants during the hours the center is open--by five months from today.
4. Each volunteer tax center will have a library of materials on the tax law and tax instructions, assembled by three months from today.

These short-term objectives contribute to long-term objectives of providing competent service to the clients. We have a definition of what we need to accomplish by various dates in order to reach that long-term objective. We have written short-term objectives that reflect those intermediary accomplishments. Each short-term objective is feasible, dated, measurable and indicative of an acceptable level of accomplishment.

See if you can choose the appropriate short-term objectives for another long-term objective. You are working with a high school volunteer clearinghouse whose purpose is to "provide long-term educationally enriching experiences to students through community service work."

The long-term objective relates to the duration of the experience and to the commitment of individual students. The LTO reads:

"One year from today, at least 40 percent of our volunteers will have fulfilled these commitments for a minimum of six months."

The project leaders decide that the following factors have an impact on their ability to reach this objective:

1. They aren't sure exactly why people drop out.
2. Some of their projects have considerably higher drop-out rates than others--thus they lose a lot of the students who sign up for these particular projects.
3. They know that a lot of students drop-out because it's "not what they expected." Better organization might cut down on those drop-outs. A written contract, which helps a student express what he expects to give and gain in the volunteer experience, might also help.

Given this purpose, this LTO, and these factors, which of the following short-term objectives would you consider appropriate and complete?

- ☐ 1. Two months from today, we will have contacted 90 percent of the volunteers who signed up this semester, and recorded in written form the reason for all drop-outs.
- ☐ 2. By three months from now, we will publish a newsletter of at least four pages.
- ☐ 3. We will discontinue projects which have a high drop-out rate.
- ☐ 4. By nine months from today, we will have met with members of all projects which have a drop-out rate of greater than 50 percent during a semester to ascertain the reasons for the high drop-out rate.
- ☐ 5. We will discontinue any project whose drop-out rate exceeds 50 percent over a semester for two successive semesters.
- ☐ 6. Beginning six months from today, every project will be required to have an organization for volunteers in which the volunteers learn what they should realistically expect from the volunteer experience.
- ☐ 7. Eight months from today at least 50 percent of our projects will use some form of a volunteer contract in which the student indicates his expectations for the volunteer experience.

Which of the seven STO's above did you choose as appropriate for the long-term objective.

Other people who work with student volunteers made the following choices for the reasons given. If you differ with them on more than one or two answers, you might want to reread the material on short-term objectives again.

1. YES: Contributes to LTO--yes, by students getting data on why people drop-out. Feasible--seems so. Dated--two months from today. Measurable--yes, the material is in written form, so the measurement involves observing that it has been done. Acceptable level of accomplishment--yes, 90 percent of volunteers.
2. NO: Contributes to LTO--no, not according to the material presented. Feasible--yes. Dated--yes. Measurable--yes, by counting. Level of achievement--yes.
3. NO: Contributes to LTO--yes. Feasible--yes. Dated--no. Measurable--no, doesn't indicate what a high drop-out rate is. How do you measure it?
4. YES: Contributes to LTO--yes. Feasible--yes. Dated--nine months from today. Measurable--yes, by percentage. Acceptable level of accomplishment--yes, all projects with a certain drop-out level.
5. NO: Contributes to LTO--yes. Feasible--yes. Dated--no. Measurable--yes, by counting and percentages. Indicative of acceptable level of achievement--yes, any project with drop-out rate over 50 percent for two successive semesters.
6. YES: Contributes to LTO--yes. Feasible--yes. Dated--yes. Measurable--yes. Gives acceptable level of accomplishment--"every project" has an orientation which tells the volunteer "what he should realistically expect from the volunteer experience."
7. YES: Contributes to LTO--yes. Feasible--yes. Dated--yes. Measurable--yes. Acceptable level of accomplishment--yes, but might need further definition of a "volunteer contract."

Get most of these right? You've learned to recognize a good short-term objective.

Now go back to work as a consultant to the high school project leaders who were discussing their problems on page 37. Three problems were:

- ° getting male tutors
- ° getting a new project leader
- ° keeping the volunteers that they get

They have three long-term objectives for themselves:

1. A year from now, we will be able to match every little boy needing tutoring with a male tutor by the third week of the semester.
2. The number of tutors who stay in the project at least one semester will have increased by 50 percent by one year from today.
3. Six months from today, we will have chosen, trained, and placed on the job a new project leader.

Project Leaders Meeting (continued)

BETH:

We agreed today to work on the problem of getting male tutors and _____ (fill in your name) is here to help us. Who's got an idea?

GENE:

I think guys don't volunteer because a lot of them don't think they can do it. Maybe if we provided training so they would feel better about their ability to tutor..

WALLY:

Or maybe it would help if one of us guys who have been tutoring would talk with them? Then they can see that there isn't anything all that difficult about what we're doing. Or maybe each of us could recruit one friend.

JOHN:

We recruit in social science classes, but there aren't many guys in those classes. Maybe we should choose other classes.

SALLY:

Maybe if our recruitment poster had a male tutor on it, they'd get the idea that this project needs them.

WALLY:

Yeah, and maybe if they got to meet the principal (he's male) they'd feel a little more at home in the school setting.

SUE:

Do you suppose the fellows are afraid they won't like tutoring? What if we had some place they could meet us--and maybe get to know some of the little kids--without making a commitment to the project. We could have our party at the end of the semester here at school.

Given this conversation, what would you see as the most appropriate short-term objective to contribute to the accomplishment of the long-term objective that:

"By one year from today, we will be able to match every little boy needing tutoring with a male tutor, by the third week of the semester."

Short-term Objectives

1. _____

2. _____

3. _____

4. _____

Check your answers. Are each of your short-term objectives:

- ☐ designed to contribute to the long-term objective
- ☐ feasible
- ☐ dated
- ☐ measurable
- ☐ indicative of an acceptable level of accomplishment

Here are the short-term objectives our group took from the same case. How do yours compare?

1. Five months from today we will have designed and implemented at least a two-hour training session for all tutors.
2. Three months from today, each male tutor will have recruited at least one male friend to be a volunteer in the project.
3. By the second week of next semester, we will have at least 200 male student volunteers.
4. Two months from today we will have designed, printed, and distributed new recruitment posters that show a male tutor working with a little boy.
5. One month from today we will have solicited a commitment from the school principal to be at our orientation meeting.
6. Beginning next semester, the project orientation will be held at the school prior to volunteers making a commitment to the project.
7. We will have our semester party for the kids at the school.

Note that some short-term objectives have an impact on two or more factors. For instance, if the orientation is held at the elementary school, the volunteers will be free to make a commitment to the project after the orientation.

- male volunteers could see what the project is all about without making a commitment immediately.
- male volunteers could also meet the principal and thus feel more comfortable in the school setting.
- male volunteers could talk with veteran male tutors about their experiences.

Obviously it is advantageous to choose short-term objectives that have an impact and a multiple effect on the accomplishment of the long-term objective.

It is also good planning to choose short-term objectives that contribute to more than one long-term objective at a time. Take another look at the two long-term objectives of this group. Short-term objective one, will not only tend to attract male volunteers by assuring them that they will enter their roles with sufficient skills, but it will contribute to the retention of all volunteers by giving them an idea of what to expect and by providing them the skills to do a good job. It contributes to the group's second long-term objective as well as its first. It is a double-duty objective. Obviously, a short-term objective that can play such a dual role is an energy and resource saver.

Practical Uses

Now you know what a short-term objective is; you can identify short-term objectives and design them to contribute to the accomplishment of a given long-term objective. But before working on your own project again, take a look at the practical uses of short-term objectives, as well as some problems you might have in working with them.

Practical Advantages

Short-term objectives have several very handy uses:

1. They break large targets up into less overwhelming smaller targets. They create possibilities out of seeming impossibilities.
2. They help you see what needs to be done in the near future, in order to accomplish something at a later date. They let you know how you are progressing toward long-term objectives. If your short-term objectives are well thought out, and if you meet them on schedule, you will probably accomplish your long-term objectives.
3. They present negotiable small packages; when somebody walks into your office, wanting to help, you can say, "Sure you can help. What I need most is a tutoring recruitment poster with a male tutor on it. Can you design it for me?" And before you know it, you have what you need. And you have it because you have a clear idea of what you need, why you need it, and when you need it.
4. They help you set and explain priorities. Suppose somebody wants to put out a newsletter, but it is not part of any of your short-term objectives, nor does it look like it would contribute to any of your long-term objectives. You can say, "we really don't need a newsletter as badly as we need a campaign to recruit male tutors. How about helping us on that?"

Traps, Pitfalls and Misuses

Nothing's perfect, and people can get tangled up in using short-term objectives. Here are some examples:

1. Sometimes people over-define a level of acceptable achievement. Be sure that you are only as detailed as you need to be.

2. Sometimes people choose short-term objectives without being sure that they will contribute to the long-term objectives. If training a volunteer doesn't increase his chances of staying with the project, it's foolish to set up training as a short-term objective to contribute to retention. Make sure your assumptions about impacts are correct.
3. Sometimes people meet the letter rather than the spirit of the short-term objective. For example, if the short-term objective of the tutoring project is for every male tutor to recruit a friend, the fellow who drags a pal to the orientation promising, "You don't have to do anything, just show up this once and you'll get me off the hook," is only meeting the letter of the objective. Nothing is really being accomplished.
4. Sometimes people fail to complete their short-term objectives, so they give up on the long-term objectives and junk the whole thing. If you fail to achieve a short-term objective, don't give up. Ask why things are not moving faster. Adjust deadlines as necessary.

Work on Your Program

It's time for you to go back to work on your own program or project. On pages 42 and 43 you wrote several long-term objectives for your organization. Select one to work on; write it below.

Long-Term Objective

Now list all the factors you think are involved in achieving that objective:

1. _____

2. _____

3. _____

4. _____

5. _____

Translate these factors, into short-term objectives that:

- °Contribute directly to your long-term objective;
- °Are feasible;
- °Are dated;
- °Are measurable;
- °Indicate an acceptable level of accomplishment.

You might even try to write some short-term objectives that will have influence on more than one factor, or even better, a short-term objective that will help you accomplish more than one long-term objective.

Short-Term Objectives

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

Check your objectives for completeness.

We're now ready to turn to the final element of the Planning by Objectives system, the planning details.

SECTION V

ELEMENT 4 -- PLANNING DETAILS

We have moved through the first three levels of a Planning by Objectives system; purpose, long-term objectives, and short-term objectives. We are now at the final and most immediate stage--planning details. We've been breaking the work of your organization into smaller and smaller packages. Planning details are the smallest package. They must be met in order to accomplish a short-term objective, which contributes to a long-term objective, which, in turn, enables your organization to realize its purpose.

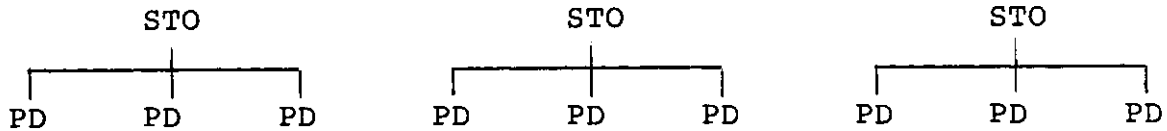
Planning details may be described as tasks that must be completed in the near future in order to achieve a short-term objective. Planning details have the following characteristics:

1. They contribute directly to a short-term objective.
2. They are feasible.
3. They are dated, indicating a completion date that is more immediate than that of the short-term objective to which they contribute.
4. They are measurable -- you can tell when they are done.
5. They indicate details of a project, major details, like completing a mailing, or taking bids on a bus -- but not minuscule details.

Planning details could be called by a lot of other names such as:

- immediate objectives;
- tasks;
- activities.

Whatever you call them, they are the more detailed, more immediate, smaller element of the Planning by Objectives system. A diagram of the relationship between planning details and STO's would look like this:



Let's look at an example of some planning details. The purpose of a tax project is to provide low-income people of Milwaukee with an accessible, reliable, technically complete, free tax service. A long-term objective related to the technical competence of the service is:

"By the close of this year's tax program on April 30, 98 percent of the tax forms will have been correctly completed."

This long-term objective yields a short-term objective which reads:

"We will have recruited at least 25 volunteers by four months from today (December 20)."

What needs to be done in the meantime, before December 20, to insure that on that date we have the 25 volunteers? Those activities or tasks contributing to the achievement of that short-term objective are the planning details. Here are some examples:

1. By September 15, to have developed, written, and printed a job description for tax volunteers, to be given to prospective volunteers.
2. Meet with the faculty head of the School of Business by October 1.
3. Present program to students of the School of Business by November 1. Sign up as many volunteers as possible.
4. By December 1, send a follow-up mailing to students of the school who did not volunteer (including an application and requesting that they return the completed application, if they wish to volunteer, by December 15th).
5. On December 20, meet with all accounting volunteers and determine their training needs.

These planning details: (1) contribute to the STO -- they can't stand on their own, without an STO to which they contribute small details, (2) are feasible -- your experience indicates that they can be done, by the specified

time, (3) dated -- they indicate a final date when this thing must be accomplished, prior to the date of the STO, (4) are measurable -- in other words, you can tell when they have been accomplished, (5) indicate details of the STO, but not so minor as to be ridiculous.

These planning details are the actions that common sense and your experience indicate are necessary to the completion of a short-term objective.

If planning details are so logical, so simple, so easy to write, why write them down at all? Here are some reasons:

- ° If your planning details are written down, you're less likely to forget what they are and when they need to be done. Things won't sneak up on you or get away from you. You won't end up at the time you were to have accomplished your short-term objective without having made any progress toward it.
- ° If your planning details are written down, you can see when you have too many activities and details bunched together, and you can arrange these activities or tasks and deadlines to make better use of slack time. So you end up with a less cyclical organization, a calmer, more organized program or project.
- ° Writing down planning details enables you to check those details more closely and make sure they fulfill all the criteria.
- ° Written planning details make neat packages to hand to workers. You can say, "I need a tax volunteer job description, written, typed, and 50 copies mimeoed by September 15. Now, who will do that?" If a volunteer or a staff member says, "What can I do?" you are organized enough to have something to give them.
- ° Written planning details enable you to divide up a short-term objective among your staff (volunteer or paid) and still have accountability. You know who's doing what and when each element needs to be completed in order for the STO to be accomplished.
- ° Some planning details (like some STO's) do double-duty. They contribute to two STO's at once. For example, if one person is working

on a mailing that must go out by January 1 (and it contributes to one STO) and you have another mailing to go to the same group a few days later (which contributes to another STO), you can combine the two mailings and save time, money, and energy. If, however, your planning details are not written down or recorded somewhere, the person who is responsible for one mailing may not realize that there is another mailing planned for the same group. Then you have duplication of effort and wasted resources.

Planning details are the most elementary part of the Planning by Objectives system. You probably have a lot of experience already with this level of planning. But let's see if you can choose appropriate tasks in the example below, which comes from our old friends from the high school tutoring project.

The short-term objective is:

"Two months from today, on April 1, we will have designed, printed, and distributed copies of a new tutor recruitment poster with a male tutor on it."

Which planning details seem to you to be appropriate for this short-term objective:

- ☐ 1. By February 15, to have the copy ready for the printer.
- ☐ 2. By February 15, to have the art work completed.
- ☐ 3. Posters should be to the printer by February 22.
- ☐ 4. Distribution system designed.
- ☐ 5. Posters distributed by April 1.
- ☐ 6. Format for the poster planned by February 5.

Which did you choose:

(1) YES:

Related to STO, feasible, dated, measurable (you can tell when it's done), small detail.

(2) NO:

Related to STO, feasible, dated, not very measurable -- what do you mean by art work? It seems like too minuscule a detail to us, but you could argue the point.

(3) YES:

This meets all the criteria.

(4) NO:

Not dated, otherwise OK.

(5) YES:

This has everything needed.

(6) YES:

So does this one.

Did you choose the same planning details that we did? If you had trouble with this, reread the material.

Your Program Once More

Now, go back to a short-term objective for your own program or project.

Short-Term Objective

List below the tasks you need to get done in order to achieve that short-term objective by the desired dates.

Planning Details

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

Check your planning details to make sure that they fulfill all the criteria.

Are they OK? We suspect that you may have found this level of the Planning by Objectives system the easiest because most of us are familiar with organizing details.

Now that you've had some practice outlining tasks, let's see what you have accomplished thus far. You have written a purpose statement and identified the grand purpose and the special interests purposes that related to it. Next, you have identified the long-term objectives that purpose statement suggests. For one of the long-term objectives, you have designed short-term objectives. And for one of those short-term objectives, you have outlined the planning details necessary to the completion of that short-term objective. Now if you were to return to your LTO's and write STO's for each -- and for each STO, write planning details, you would be well on your way to using Planning by Objectives. (In the appendix, are extra forms you can use to complete those STO's and planning details). You have mastered the basic tools of the system. Now it's a matter of learning the various ways to use the tools, and gain some practice with them.

Flexibility Of The System

Although the system that you have learned was presented to increase your effectiveness with volunteer programs, you probably have realized by now that it can be used in order to plan and organize any group. The skills you have mastered here should stand you in good stead in any work you do.

In addition, the thought processes involved -- breaking your organization's desired accomplishments down into more and more manageable pieces -- can be applied to all aspects of your work with student volunteers.

If you are a leader of a project or program, PBO can help you:

- ° get organized
- ° delegate tasks

- ° use manpower effectively
- ° set policy
- ° evaluate in an on-going way
- ° set priorities
- ° look at creative new processes for achieving accomplishments rather than getting locked into specific activities.

If you are an individual volunteer, it can help you:

- ° articulate what you hope will be accomplished for the client
- ° articulate how you hope to grow or learn as a result of volunteering
- ° plan your activities
- ° define a victory and gain a sense of accomplishment
- ° evaluate your effectiveness
- ° negotiate your relation with an agency

If you are responsible for a single area of activity (recruitment, publicity, funding, transportation), it can help you:

- ° set priority for goals
- ° see how your work relates to the total direction of the program
- ° organize your resources
- ° use talents of others effectively

If you are a teacher involving students in volunteer work in order to enrich their learning, you can use PBO to:

- ° get the project operating
- ° set objectives for what the students will accomplish as well as what they will learn from the experience
- ° articulate to community agencies why you are placing students
- ° defend your efforts in this specialized type of learning to your supervisors

SECTION VI

EVALUATION

Full evaluation of a volunteer program or project can be a complex and time-consuming process, and it requires considerable knowledge and experience. It goes far beyond the scope of this manual.

Conversely, evaluation within the scope of PBO is simple and precise, yet it can be used as an important and major part of an overall evaluation.

PBO, as we know, involves four basic elements:

- ° Purpose
- ° Long-term Objectives
- ° Short-term Objectives
- ° Planning Details

The purpose of a program or project is timeless, general, and unattainable. As such it is not suited to precise evaluation.

Long-term objectives, on the other hand, are feasible, dated, measurable, and indicative of an acceptable level of achievement. Nothing could be easier to evaluate. Either you did it or you didn't. It is a simple "go-or-no-go" decision.

For example, the long-term objective in the tax service project was:

By the close of this year's tax project, 98 percent of the clients' tax forms will have been correctly completed.

If this was done, it is a simple and precise project to evaluate. It is the same as a true-false quiz in which you got all the answers right. You get 100.

You should go one step further in your evaluation even though you did achieve your goal. Suppose this project is just one of five in your program and for this program you had 15 long-term objectives. In every instance you fully achieved your objective.

Maybe you are a managerial genius; maybe you had a lucky year; but maybe you have been setting too low an acceptable level of achievement. If one of your objectives is to have at least 15 children in the Mt. Morris Housing Project participating in the after-school recreation project, and 40 children actively participate, next year you should try for 60. Keep it feasible, but set your sights a little higher.

This is an important aspect of evaluation. If you are too successful, you are not setting high enough levels of achievement.

More likely, you failed to reach your goals for a few objectives. This calls for another evaluation process to which PBO is ideally suited.

Assume that at the end of the tax service project, only 85 percent of the clients' tax forms had been filled out correctly. What was wrong? Why did you fail to reach 98 percent?

Go back to your short-term objectives as the first step in your evaluation. Basically, these stated that:

- All tax volunteers would receive 10 hours of training.
- Twenty-five volunteers would be recruited.
- Telephones would be put in the tax center.
- Each center would have a library.

Well, you almost made it. The only place you missed was that all 25 volunteers did not get 10 hours of training. The reason was that no one was quite sure what training was needed, so the training sessions were dropped after the first five hours. Since you succeeded in all of your other short-term objectives, this may be the cause of your failure.

Let's search a little further. Which of your planning details relate to this short-term objective?

No question about it. Planning detail number five on page 62, says that on December 20, meet with all accounting volunteers and determine training needs. What really happened was that only five volunteers showed up. All the others had gone home for Christmas vacation. You really never established your training needs.

As a result, the volunteers did not get the training you promised in your short-term objective, and this meant you failed to reach the desired level of achievement of your long-term objective. "For the want of a nail, a shoe was lost..."

Evaluation within the strict limits of PBO is simple and precise, but it is only a part of project or program evaluation. It does not deal with cost effectiveness (unless this is itself a long-term objective). Even when accomplished, a long-term objective may not sufficiently justify a request for support from a sponsor. It seldom attempts to measure impact of the program on the clients.

PBO evaluation can, however, serve as a major input for total evaluation, and it makes it much easier. If you are interested in knowing more about evaluation, write NSVP for additional materials.

APPENDIX A

QUICK REFERENCE GLOSSARY

QUICK REFERENCE GLOSSARY

1. CLIENT:

The persons your organization serves.

2. CLIENT-CENTERED:

Used in reference to objectives, this means that the objective describes a level of service to the client.

3. GRAND PURPOSE:

The purpose of the larger organization or movement of which your organization is a part. It is broader than your program or project purpose.

4. LONG-TERM OBJECTIVES:

Objectives that you expect to be accomplished at a time in the distant future and which are derived from your purpose.

5. LTO:

Short-hand for Long-term Objectives.

6. ORGANIZATIONAL-CENTERED:

Used in reference to objectives, this means that the objective indicates the level of organization and resources needed to serve the client.

7. PBO:

Short-hand for Planning by Objectives.

8. PLANNING DETAILS:

Tasks that must be completed in the near future in order to achieve a short-term objective.

9. PLANNING BY OBJECTIVES:

A results-oriented system based on the use of well-articulated objectives that can be used for the effective planning and implementation of new programs and the changing, redefining, or directing of existing programs.

10. PROGRAM:

See Volunteer Program.

11. PROJECT:

See Volunteer Project.

12. PURPOSE:

A general, timeless statement indicating why your organization is in business and whom it is serving.

13. SHORT-TERM OBJECTIVE:

An objective you expect to be completed by a date prior to the date of the long-term objective to which it contributes.

14. SIP:

Short-hand for Special Interest Purpose.

15. SPECIAL INTEREST PURPOSE:

Purposes that your allies have for working with you. Must be compatible with your program or project purpose.

16. VOLUNTEER PROGRAM:

The total effort of a school or university to involve students in service to the community. Often refers to the coordinating office, the umbrella office, the volunteer bureau, the Service-learning Coordinating Office in a high school, the Volunteer Services Office of the University. Sometimes referred to as "program."

17. VOLUNTEER PROJECT:

A group of student volunteers providing a particular service to a particular group of clients--a tutoring project, an income tax project, an after-school recreation project. Sometimes referred to as "project."

APPENDIX B

WORK SHEETS AND FORMS

PURPOSE STATEMENT

The purpose of _____
(name of organization)

is to _____
(nature of service

for _____
(identify your client, including geographical area,
age, economic level, etc. as appropriate)

GRAND PURPOSE

_____ is a part of
(name of your organization)

(name of larger organization of which it is a part)

whose purpose is _____

_____ for _____
(identify their client)

SPECIAL INTEREST PURPOSES

_____ sees the purpose of
(name of ally)

(name of your organization)

as _____
(general description of the kind of service you
provide which makes them willing to help you)

for _____
(description of client they wish you to serve)

_____ sees the purpose of
(name of ally)

(name of your organization)

as _____
(general description of the kind of service you
provide which makes them willing to help you)

for _____
(description of client they wish you to serve)

ARRIVING AT LONG-TERM OBJECTIVES

Write the purpose statement from Form 1 here:

The purpose of _____
_____ is to _____

for _____

What does your purpose statement suggest is needed?

1. _____

2. _____

3. _____

4. _____

5. _____

GENERAL STATEMENT OF NEEDS

What part of what is needed (Form 4) do you want to provide?

LONG-TERM OBJECTIVES

Form 6

Rewrite the general statement of Form 5 in terms of desired accomplishments. They should be: (1) feasible (2) dated (3) measurable (4) indicative of an acceptable level of accomplishment. Include organizational long-term objectives that are necessary to achieve the client-centered objectives.

1.

2.

3.

4.

5.

Check your long-term objectives to make sure that they are feasible, dated, measurable, and indicative of an acceptable level of achievement. Using the forms provided below, for each objective, indicate how each objective meets these four criteria:

Objective 1.

1. Feasible, why? _____

2. Dated? _____

3. Measurable, how? _____

4. Acceptable level of accomplishment? _____

Objective 2.

1. Feasible, why? _____

2. Dated? _____

3. Measurable, how? _____

4. Acceptable level of accomplishment? _____

Objective 3.

1. Feasible, why? _____

2. Dated? _____

3. Measurable, how? _____

4. Acceptable level of accomplishment? _____

Objective 4.

1. Feasible, why? _____

2. Dated? _____

3. Measurable, how? _____

4. Acceptable level of accomplishment? _____

Objective 5.

1. Feasible, why? _____

2. Dated? _____

3. Measurable, how? _____

4. Acceptable level of accomplishment? _____

ARRIVING AT SHORT-TERM OBJECTIVES
AND PLANNING DETAILS

Long-term Objective:

Short-term Objectives:

Planning Details:

Short-term Objectives:

Planning Details:

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