

DEVELOPING LIFE PLANS

*a new concept
and design for
training and development*

Many organizations are trying to cope with the problems created by increasing anti-establishment feelings, a mobile working population, a shorter work week and job obsolescence caused by technological and knowledge explosion. These problems are accentuated by a desire on the part of individuals to actualize their own potential. A new concept of the training and development responsibilities of organizations is needed and is here proposed.

It seems apparent that a fundamental way to be of service to people in organizations is to help them examine their life goals and plans as a means of achieving their own potential. Tests and counseling services are used for youth in career planning, but it is rare to find such a service for adults. Some counseling clinics and individual therapy for adults exist, but this is usually conducted in a clinical setting where the individual goes to a professional counselor out of major concern for some problem confronting him. This new concept suggests that organizational training and development practitioners make available individual and group experiences that will assist employed and productive persons in their organizations to review, evaluate and examine their life plans.

There are several reasons why a company, agency or organization should assume such a responsibility for its employees:

1. To demonstrate the larger *social responsibility* of a mature organization.
2. To indicate to adult employees that the organization *cares* about them as individuals.
3. To more effectively *release the potential* of the individual in behalf of the organization.
4. To help the individual prepare for *change* in society, the organization, and himself.
5. To strengthen the *psychological contact* between the individual and the organization.

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6. To plan more effectively the learning experiences the individual will require to achieve his life goals.
7. To focus on the person as a whole individual whose total life inter-relates.

How are these goals achieved? First, let us examine the objectives and rationale of the design:*

1. To help participants look at themselves, to decide what is important to them, and to develop projects for the future which will provide them as much individual need satisfaction as possible.
2. To build a climate of trust in a three to six-person group.
3. To present an opportunity for practice in giving and receiving help.

The rationale of the design, stated simply, is:

Personal objectives for the future are almost impossible to state without first doing some "getting in the mood" kinds of activities. In this design, these activities aid a person to display a number of important aspects of himself to himself. Of special help to the participant is an inventory of aspects of himself that help him to understand where he is at this point in his life and what are some of his rather immediate expectations. Once these are displayed, the choice of future actions, plans and projects becomes easier.

The "sharing" parts of the design are aimed at revealing one's self to others and through "joint-sharing" to generate more self-growth goals than one could achieve through self-insight alone. This gradual revelation of self, during one or more sessions, builds trusting relationships as well as acceptance of self and others.

INTRODUCTORY PHASE

Trainer presents the objectives to the group as outlined above. He then gives a rationale for the experiences the group

*I was first introduced to some of the group methods in life planning by Dr. Herbert Shephard, a pioneer in this kind of work during the past five years. The design explained in this article, with some modifications, is taken from an exercise conducted by Dr. Shephard at Bethel, Maine in July 1969 for the participants in a Program for Specialists in Organizational Training and Development. This program was sponsored by the NTL Institute for Applied Behavioral Science.

will share. He points out that stating objectives for the future is a difficult task for all of us; that the experiences will assist each participant to review his own feelings about his own self-concept and his plans for achieving or revising that self-concept; that as a result of these experiences the choice of future actions, plans and projects will be easier for each participant to achieve.

If necessary, the trainer may wish to have the group set time limits, physical arrangements, and other details to lessen the effects of any unknown time or physical restraints. Prior to the session the trainer should prepare instructions (given below) on separate sheets and distribute them at the appropriate time.

It helps to get the consent of the group involved before starting. A question can be asked, such as "Would you be willing to spend some time looking into the future and making some plans for yourself?" This question, if answered fully, should promote enough response to determine if there is active resistance. Individuals who actively resist probably will not get involved enough to gain from the experience and, if they wish, should be excused. An alternative would be to assess the degree of readiness in individual interviews prior to group meeting.

A WARM-UP PHASE

Divide groups into natural work groups or previously established learning groups. Four participants in a group appears to be an optimum number. The trainer now helps the group "get into" the experience. He can explain as follows:

"Today we will look at where we are, who we are, and what we like, and try to spread these out in front of ourselves. Then with this information available, we can look to the future and try to fit it in as best we can to our own plans, objectives, and growth. Everyone will need a pencil and about 15 pieces of paper.

"The results of this experience will mainly be for your own use."

The trainer then gives his first instruction to the small groups:

Line Drawing Activity

Trainer: "Your first task is to – draw a

horizontal line from left to right representing your life – put a check on it where you currently are now – spend a few moments discussing with your group why you drew the line as long as you did, and why you put the check where you did – ask any questions about it you want. Focus on age or growth, whatever you choose." (Place emphasis on importance of this step.)

After groups appear to have discussed this sufficiently the trainer then introduces the next activity:

Who Am I Activity

Trainer: "It is a part of our culture to explain things chronologically. Therapy deals with the past, while sensitivity training deals with the present, the here and now. Probably the most important thing about behavior that is occurring here and now is that it has consequences for here and now, plus past explanations, and future eventualities. So, today, we will work on the right hand side of the check mark you have made on your life line, and look at that part of your life that hasn't happened yet. We will investigate the right hand side of your line as much as we can, rather than slip back to the left side. Write – on ten separate pieces of paper – ten separate answers to the question, "Who am I?"

"You have your own way of thinking about yourself. You may think of yourself in terms of your role, or in terms of qualities that you have. You may think of yourself in terms of your negative attributes. Or you may think of yourself as a mixture of all of these different frameworks. Whatever framework your life has had, try to find different answers to the question, "Who am I?" and write them down. When you are done, I want you to review the ten answers and think about what you would be if you eliminated any one of them.

Wait until all have finished.

"When you have finished writing, rank order them. At the top of the rank order, put those self-descriptions that are most essentially you, and at the bottom of the rank order put those self-descriptions that you could most do without and still not lose your most essential qualities."

Trainer should check for understanding by the group.

"After you have finished your rank order share these with one another, and discuss them freely."

After giving the group a chance to discuss their cards with each other, the next warm-up activity can be introduced.

Autobiographical Activity

Trainer: "Next, move all the way over, almost to the right end of your life line, and write a brief autobiography that might appear at that point in time in *Who's Who*.

"Don't write this autobiography as an obituary. Write what you would like to have written about you and what you might be able to accomplish. It should be a statement you like to read, and contain accomplishments that are possible. It should be realistic, but still things about yourself you believe are really conceivable. Now share your autobiographical sketch with the rest of your team, and discuss it. Then go back to your list of ten "Who Am I?" statements and add any additional statements that would further explore what you would like to be."

At the end of this time period it would be appropriate to schedule a break; or it may be appropriate to adjourn this first session, if that is the nature of the development activity schedule.

B. LIFE INVENTORY PHASE

In this phase of the design, the participants should more fully examine their aspirations, assets, inadequacies, and expectations. It is helpful if the trainer has forms ready for displaying the cost of the inventory items explained below; but if not, he should list these items on a chalkboard or chart pad so the group can refer to them as they make their individual lists.

Trainer: "This next step is quite hard work. Something called a *life inventory*. To look at all the things that you do and would like to do. It will help you to display all of yourself in terms of your activities and values. It ends up as a map of your life in terms of a number of elements which may or may not be overlapping. I am going to write down these elements for you."

1. The first element is entitled – "Peak Experiences."

Trainer: This definition is broad enough so that they are not necessarily the most exquisite moments you have had. These are or have been your "kicks" – the moments in your life that are remembered as having been really great; the times when you have felt you were really living and enjoying living. These are the moments that have made you feel living is worthwhile. It is a list of the events that have mattered to you in terms of making you feel you are glad you are a human being and glad you are alive."

2. The second element is — “*Things I Do Well.*”

Trainer: “Some of these probably are things that are very meaningful to you. There may be duplication with your first list. Some of the things you do well may be things that bore you to death. This is a hard list to compile because it competes with our cultural norm of being modest. Try to overcome this inhibition.”

3. Next, “*Things I Do Poorly.*”

Trainer: “This list should contain things you want to do or you have to do, but not necessarily things in which you have no interest. It should be a list of things you do poorly that for some reason or another you need to do. You may play the violin poorly, but if you have no interest in or need to do it, don’t include playing the violin.”

4. The next element is, “*Things I would Like to Stop Doing.*”

Trainer: “This might or might not be things that you have to do but would like to stop doing. Someone else in your team might be able to suggest some things that it would be good for you to stop doing — now, or in the future. Some of the things on this list may be things you would like to do but that you know you do poorly. Others might be things that you hate to do, but for some reason feel you have to do.”

5. Next, “*Things I Would Like to Learn to Do Well.*”

Trainer: “This might be a list of desired skills that you would like to include in your personal and potential life. It might be related to an avocational activity or a new skill in your present job.”

6. Our sixth element is, “*Peak Experiences I Would Like to Have.*”

Trainer: “These are the kinds of things you imagine you would like to have happen to you but which have not.”

7. The next element is, “*Values to be Realized.*”

Trainer: This element is less clear than the others. Value means many things to many people. It might be being rich, having deep friendship, or being with young people. They can be tangible, but most probably are not.”

8. Our last element is “*Things I’d Like to Start Doing Now.*”

Trainer: “The objective here is to explore some of the things you may have been putting off, but which you really want to start doing. It might be growing a beard, becoming more aggressive, asking for more

responsibility on your job or a number of other similar items.”

Following completion of listing the elements on a chalkboard or chart pad, the trainer will want to set some guidelines and time limits.

Trainer: “Let me also suggest a procedure. It’s best for the person whose inventory is being taken to be free just to think and respond, and not have to write in detail. If other team members will serve as consultants, interviewers and recorders, the person being inventoried will not have to bother writing down things and can be free to respond. Don’t beat it to death. Get down those things that are revealed spontaneously, and move on to the next person. Move at a lively pace, then go back and add those things that people want to add to their lists. It’s best to spend 10 minutes or so with each individual, but you can also take each element in order among all the members of the group.”

This phase of the experience will take at least an hour. This may be a good time for another break so that the participants can relax before moving on to the “action planning” phases of the design.

C. PROJECT PLANNING PHASE

The objective here is to help each individual establish goals and plans by identifying projects that can lead him toward desired achievements. Some of these will involve his personal life or his job, while others may relate to new arrangements in his life.

Trainer: “The next phase begins the formulation of projects that combine a number of the desires expressed in the life inventory. This is difficult, and there are few procedures or patterns. Instead of thinking of goals with a separate set of strategies, think of projects that provide opportunities to allow you to learn what you want to learn or that move you towards the peak experiences you want to have. In each project, try to realize as many of these values, goals and desires as you can. Try to develop an overall picture that lets you feel alive and satisfied. I can make these three suggestions:

- (a) Think of vocational or avocational projects to which you are already committed. Consider the parts of these projects that provide you opportunities to learn what you want to learn, that move you toward the peak experience you want, or that allow you to reach the values, goals and desires you want. Think about these projects in terms of what you can add or

subtract from them so they will provide you with increased fulfillment.

- (b) Then list projects that you have in mind to which you have not yet made a commitment. Consider these in terms of those which are likely to be most fulfilling for you. Make some plans for these.
- (c) Another thing you might do is brainstorm possible projects with your group. Make a list without evaluating each item. Rotate around the team, first one person and then another. After the list is made, each person can evaluate each project for himself.”

This phase of the process is where the “pay off” will take place. This part of the design will take at least one hour or more. At the end of this time the trainer may want to have some general discussion with the total group on such questions as:

- Which aspects of the design seem to be most difficult?
- Which aspects of the design seemed most meaningful?
- What surprised you the most?
- What are some of the obstacles you might encounter in accomplishing your projects?

This will provide a valuable release, evaluation and channeling of the learning experience to their ongoing life experience.

CASE EXAMPLE OF LIFE PLANNING DESIGN

The heart of a life planning design is the individual, his present relationship to his own life, and his current value system. When used with a work group in an organization, a major ingredient that must be added is information relevant to the organization’s current needs and the expectations of that particular work group. Consideration should also be given to the timing of such an “informational input” so it will be available to the participants before their plans and projects are developed.

The work group in this case is a staff of management and organization development specialists in a large corporation.*

*I wish to acknowledge the valuable contribution of Charles F. Fitzsimmons to this phase.

It is composed of the staff supervisor, four staff managers, and one secretary. The group had been involved in joint objective-setting for a year and a half. However, all previous activity had evolved from an examination of the group's responsibilities and translation of these into mutually agreed upon objectives for the group. These group objectives were then carried out by members who volunteered to undertake them or, by natural division of talents, certain projects went to certain members. Admittedly, the staff supervisor felt that he and the other members were ready to individualize all the objectives for the year 1970. He publicly shared his search for a method or resource that would accomplish this goal. He accepted the life planning and inventory idea, as modified to include some input of company goals, needs, and expectations for the coming year.

The work group met at an interference-free location, handled other concerns in the morning and began the design in the afternoon. The "warm-up phase," described earlier, was conducted in the afternoon. As a general reaction the participants favored the exercise and indicated that they were in the mood for further life planning and inventory. Some comments were: "I've never really taken this kind of time to look at myself"; "my rank-ordering of the "Who-am-I?" cards changed a couple of times and the others helped me examine this quite closely"; "The conditions seem ripe for this and I'm getting plenty of personal help"; and "I'm hooked on this, now."

The design was halted at this point to allow time for the superior of the work group's leader to spend an hour discussing, from the viewpoint of his position in the organization, the outlook for the coming year. His talk included some areas where his boss thought work was needed as well as some general priorities. Ample time was allowed for questions, clarifications and probings from the work group. After he left, the work group leader offered some of his own

reactions and priorities of a general nature. The work group agreed to meet the next morning to continue the design.

At the next morning session, the "Life Inventory" phase of the design was conducted. This is the most time-consuming section, but also the most productive in terms of generating a vast amount of information for each individual regarding his present mood and some foreseeable expectations. At this point the participants felt they had enough to think about and asked for time to assimilate and understand what they had learned.

Two days later the work group reconvened to try the "Project Planning" phase. Points of clarification were handled first. Re-establishing the proper mood was not a problem because a review and discussion of the information obtained earlier helped regenerate enthusiasm. Projects and plans were tentatively laid out and a priority assigned. Then a reality testing period was proposed and each member individually began to test his plans against the time available for the next year. There were more plans and projects than there was time available for this testing. A best accommodation was made by placing the items in order of priority.

The session ended with a commitment to meet again in two weeks. Each participant committed himself to bring with him his plans and projects for the coming years in a "Management by Objectives" format. In addition, these objectives would include earlier developed criteria such as: desirable, attainable, satisfying, measurable, legal, moral, ethical, positive, accounting for known internal blocks, written, and flexible enough to allow for unknown essential priorities.

Group reactions to this design ran like this: "It helped me to understand my own priorities in terms of personal growth;" "I've never done any long-range planning before, but after I realized the satisfaction of some previous plans, I was anxious to affect my own future with some present planning;" "It

provided me with more insight into myself than I've ever had before;" "It helped me understand how I can realize a couple of goals in one project where before I thought something had to give;" and "I'm anxious to get on with some of the ideas I have now."

VALUES OF THIS KIND OF LEARNING EXPERIENCE

One way of evaluating this learning design is to compare its applicability to some of the emerging trends in training and development.* As we examine these trends in the light of this general design for life planning, the following observations are relevant:

1. It is more desirable to *improve performance* than merely to increase individual knowledge. This design was used to increase individual knowledge about one's self, but mainly to help the individual make better career plans for himself. Perhaps nothing will have a more profound impact on individual performance than the kind of commitment and enthusiasm that can be generated by this kind of learning experience.
2. *Group training situations* are more important than only improving the skills of an individual. The design in the case example discussed above was focused almost wholly on solving the problem of what the group would do next year and where its time would be spent. This was the first time such a design had been used with a work group in this organization. It seemed to improve the work climate and goal orientation.
3. Such training should be viewed as the *way management wants to get its job done* and not solely as a function of a training department. In the case example cited this was not really a factor since it was a training group using its own resources. It was seen as a step toward organizational achievement, however, and the same

*See Gordon L. Lippitt, "Emerging Trends in Training and Development," *The Training and Development Journal*, Feb. 1969.

design can be used with similar work groups with advantageous results.

4. It is better to build "*in-house capabilities*" than to depend upon outside experts or resources. In the case example, Dr. Shephard's design was adapted to a specific work group's development. Certainly, this is a development of "*in-house capabilities*". Also, four other training managers are now familiar with the design and can adapt it to other situations when it seems appropriate.
5. Management should insist on *evaluation of training* instead of accepting the results on faith. There was no real test of the results achieved by the work group in the case example, except that the "bosses" were pleased and thought the time was well spent. In 12 to 18 months this criteria can and should be more realistically assessed.
6. Training activities should be focused on "*learning how to learn.*" This fits with the design I have discussed, because the activities facilitated learning how to learn about oneself. There is also some built-in learning in that evaluations will go on throughout the year with each project's activity and as each plan unfolds.
7. The present trend is to move away from training that is unrelated to the *learner's* experiences or his *organization's* needs. In the case application this design was specifically meant for the learner's experiences and the organization's needs. In heterogeneous settings the application to an organization, per se, might be somewhat less.
8. There is a tendency away from didactic, non-participative approaches to learning and *more action-learning*. This design is wholly participative and resulted in real action plans.
9. There is substantial value in providing *reinforcement* and a *follow-up* experience for trainees, so that learning is enhanced by application. In work group situations the reinforce-

ment and follow-up will naturally develop throughout the year as objectives are individually tracked and progress periodically reviewed at team meetings.

10. More is accomplished by learning that is *self-motivated* by the learner rather than imposed upon him. By its very nature this life planning design is self-motivating because there is the reward of objective achievement. Also, the data generated provides a means for each individual to personally plot his own growth.
11. Instead of the vague assurance that training will be "good for you," there is greater emphasis on *goal orientation*. The use of the life planning design, as applied in the case example, had a very specific goal in mind, both for the individual and the organization.
12. There is an advantage in achieving greater *homogeneity in training groups*, so that people learn to function together in their organizational relationships. Work groups should be trained together, and the life planning design can be used exactly that way inasmuch as a part of its purpose is to build trust and to initiate practice helping. Increases in these two areas will yield great benefits to an organizational work group.

Despite this favorable comparison with a list of criteria and the favorable reactions from the participants in the case reported, real evaluation will only come in time. At least a year must pass before a true measurement of results can be taken. Only if subsequent performance improves over a period of time can a training design be considered successful. At this point, however, my observation and experience indicates that this life planning design will produce positive results.

OVERVIEW

This kind of design and its application in organizations is not to be implemented without caution, nor is it devoid of

problems to be overcome. I would not recommend it for a work group that is not ready for it. Such readiness can be assessed by answering these questions:

Is the group already a fairly cohesive one rather than one that needs elementary team building? This design is far more advanced than mere application for team building. It should not be used in a work group that has more fundamental problems. Such a group probably would have difficulties that would prevent the participants from leveling to the degree needed or that would cause them to revert to dealing with old problems rather than focusing on future activities and goals.

Is the group somewhat experienced in objective setting to see this as a legitimate endeavor? This design should not be used as an initial try at objective setting? the process is too complicated. The danger here is that it wouldn't be taken seriously, thus ending in a game.

Is the leader of the group ready for such an activity and is he willing to support it after he understands what is involved? He must be convinced that this will be helpful because he has to live with it for a year.

Are the organization's general priorities available and can they be worked in as an input? This seems especially critical since the whole effort will fail if the organization surprises the members with roadblocks to their plans and projects. Realistically, the members need to know where the boundaries are in order to develop realistic expectations.

Does the work group seem responsible and mature enough to make individual growth plans that are consistent with their resources? The key here is their past record and a diagnosis of their present psychological status. The members of the group discussed in the case example above were specialists within the organization and they were able to identify with a professional field valued by the organization. This may not be true in other work groups that have less definable patterns of personal growth and development.

As this kind of activity is considered for an already overworked training and development department and staff, a question arises as to whether it might be worth the effort, money and time. Will it really benefit the organization? The conditions of personal and organization-