

Developing Goals

Author: [Greg Cassel](#)



This work is licensed for sharing under the [Creative Commons Attribution 4.0 International License](#). The author seeks co-authors for adaptations and related works.

This is a living document. For a static version, use the *File* options to *Make a Copy* or *Print a PDF*, or consult the author(s) about adapting this document for your use-case(s).

About this Document: This document has been written to be useful for all types of creative processes. It also serves as a primary support document for [Modular Organizing Recipe](#) and [Foundations of Modular Organizing](#). Optional endnotes provide explanatory information.

Special Definitions: In addition to terms which are directly described in this document, special definitions are available if desired for the following key terms:

[goal](#), [project](#), [trait](#), [mission](#), [prototype](#), [system](#)

1 What do you want to do or decide?

Develop your topic and any related resources per the subsections below:

Identify Topics

Can you identify your *goal*-- your *vision*-- as an *intended action* or a *desired condition* in which one or more specific *resources* [\(1\)](#) has been *added*, *changed* or *removed* from a specific situation or project? Below, let's identify these *resources* which concern you and motivate you.

Categorize Resources

Can you identify each of your topic's related resources as one or more of the key types of mental, physical and media resources? If more than one type applies, which ones are the most specific? Use [Resource Primitives](#) and [Media Functional Primitives](#) in *Foundations of Modular Organizing* as needed to aid this process.

Group or Ungroup Resources

If your topic has more than one related resource, what do they have in common? Which trait or traits do they all share? Should they be addressed (and potentially governed) together, or by defining two or more goals which can be discussed separately?

Note: You can also [Merge or Diverge Goals](#), but this should usually be considered *after* the grouping or ungrouping of resources.

Draft Goal(s)

Can you *draft one goal* (at a time) by doing the following in one to three sentences:

1. Directly identify each and all of your clearly-related resource(s), their [resource-types](#), and the relationship(s) between them.
2. State your intention to either (a) create a new project or (b) *add, change or remove* the relevant resources from an existing project [\(2\)](#).

If so, you have a draft goal! Save it, if it seems important for future reference. (If you use a [developmental staging](#) system, you might even be ready to share your draft with others.)

Examples

1. *I want to build a greenhouse.*
2. *I want to develop an attendance policy for our team meetings.*
3. *I want to reorganize this workstation.*
4. *I want our company to get rid of these two vacant job positions.*
5. *I want to implement safeguards to protect this type of worker.*

2 Who

Who do you want to *add, change or remove* the relevant resource(s)? Who do you want to *use or stop using* those resources? Define any important boundaries to your goal, per the subsections below:

Intended Collaborators

If you *want or need to collaborate* in adding, changing or removing the relevant resource(s) from a social context, who should participate? It's okay if you can't define this yet, but if you can, be very specific:

1. Are the relevant resources governed by any existing projects? (If so, [consider the mission and policies](#) before proceeding.)
2. Are there distinctions between any of your intended *collaborators, consultants, testers or commentators*? [\(3\)](#)
3. For any and all of the roles above, who are the intended individuals, groups, projects or collectives? Can you define why each person or group will be invited, and others will not?

You should be able to answer all these questions, at least to yourself, in case others ask! (Write down any important reasoning.)

Consider the Mission(s) and Policies

If you want to add, change or remove the relevant resource(s) from any established project or subproject, review that “base project’s” *mission* and any relevant policies. Why does it exist, and is it an appropriate vessel for your goal? Does your goal directly support the project’s mission in one or more ways? Is your goal fully compatible with the project’s established policies, or do you seek to update those policies?

If that project is not an appropriate container, can you find or create a more suitable project?

Compare to Existing Resources

Find Similar Resources

Has a similar topic or relevant resource already been discussed, prototyped or processed within a relevant project? Does a similar goal or resource already exist? If your goal is for an established project, consult its existing resources through its website, media directory, repository (shared storage) or task management system, etcetera. Ask project members if needed via team chat, and find similar resources for closer consideration below.

Merge or Diverge Goals

Consider merging into or diverging your goal(s) from similar resources, if they exist.

1. *Merge*: If your goal is closely related to existing resources, consider integrating your goal with existing discussion, design or decision process instead of developing new ones.
2. *Diverge*: If your goal is related to existing resources, but crucially different, then consider *differentiating it further* to justify its separate, divergent development. Will you redirect people away from the existing resources, or add to existing discussion, design or decision processes? Will the authors or stewards (caretakers) of the existing resources support, or at least tolerate, your efforts? (When applicable, be mindful of communications policies.)

Use-Cases

Who do you want to use or stop using the relevant resources, and when? Each intended use-case should be definable-- if needed (4) -- as an *activity or situation* in which usage of the relevant resources would either occur or cease. The limits of each use-case can be identified by key traits of the activity or situation, including time limits (when applicable).

Examples

1. *I want everyone in this production center to add a record to [Spreadsheet X] whenever they use Bank Account 1.*
2. *I want everyone in Team X to attend Meeting 1 every Monday at 10am PT.*
3. *I want someone to lock that building every day by 5:30pm.*

3 Where

If What and Who haven't sufficiently specified *the context* (or "where") of your goal or goals, clarify that now. E.g. "I want to add a greenhouse to our community garden at [this address]", etcetera.

4 Why

Why do you want to add, change or remove the relevant resource(s)? If your motivation seems obvious to you, state it anyway in concise terms which others could understand. Be (or become) conscious of your motivations. State your motivations in terms which can sufficiently motivate others [\(5\)](#).

Please state (or at least summarize) your motivations in 1-3 clear sentences. If these sentences seem important for future reference, write them down. [\(6\)](#)

Examples

1. *(I want to build a greenhouse, because) I want to start growing seeds during the winter.*
2. *(I want to develop an attendance policy for our team meetings, because) some of us don't attend team meetings reliably.*
3. *(I want to reorganize this workstation, because) it takes too long to find specific tools here.*
4. *(I want our company to get rid of this vacant job position, because) this vacant job is unneeded and irrelevant to our company's future.*
5. *(I want to implement safeguards to protect this type of worker, because) I see a huge risk of accidents and injuries to this type of worker.*

5 When and How?

When and how do you want to achieve your goal?

If it would be a major collaborative decision or action, use [Describing Resources and Systems](#) as needed to sufficiently describe your goal(s) and relevant resources.

If you perceive urgency to act, use [Subsidiary Decision Protocol](#) along with the guidelines below:

1. For minor decisions, it's enough if you're able to state your plan of action in a simple sentence. (Not necessarily out loud.)

2. For standard decisions within the scope of your current or expected role, you should be able to describe a plan of action in sufficient detail to satisfy any curious parties while using the [Advice Protocol](#) or a similar process.
3. For major collective decisions, outside of acute emergencies, you need to do more research and development. Consider using [Developmental Staging](#). In acute emergencies, think deeply to clearly justify to yourself and others that the costs of inaction are clearly and significantly greater than the [costs of acting](#).

Costs

If cost limits are a key trait of your conceptualization and design process, take time to estimate your goal's (minimum and/or maximum) expected costs. Costs can be in person-hours, money, or any other resources which would probably be used to achieve the goal.

If needed, especially in emergency situations, distinguish the expected cost of your goal from the expected cost of *not acting*.

Examples

1. *I want to build a greenhouse for under \$2000.*
2. *I want to spend the afternoon reorganizing this workstation.*
3. *I want our company to spend \$12,000 on workplace safety improvements (to reduce the ongoing risk of severe injuries and code violations).*

6 Research and Revise

Generate Questions

Define any questions that need answering so that you can *properly develop this goal before sharing it further*.

Examples

1. *I need to find out whether a satisfactory greenhouse can be built for under \$2000 or not.*
2. *Can I even get through that mess to examine the workstation?*

3. *Does our company have \$12,000 of discretionary funding for workplace safety improvements? (Or will it, later?)*
4. *Wait, do I even know the mission of this project, and whether or not my goal is relevant and compatible?*

Crowdsource Questioning

(placeholder: integrate something like the [Clearness Committee](#) as an option here?)

Research as Needed

Do whatever research you need to answer your [questions](#) and finish describing your goal before sharing it further.

1. Consult any related project media resources as needed. Ask questions to knowledgeable co-workers if needed.
2. Research externally or in person if needed. Ask questions to knowledgeable external parties if needed; however, be mindful of any relevant personal privacy and data security needs.
3. *Consider the Sources:* The credibility of all information sources is crucially important. Cross references are extremely helpful for developing accurate information and collective wisdom.

Revise and Share

Revise your goal description, and any related relevant resource prototypes or revisions, after concluding necessary research. Share your goal with others in some relevant context, such as an existing project and its [developmental staging system](#), etcetera.

Endnotes

About Resources

A *resource*, in the most generic sense, is any non-agent force or form which can support one or more *goals*. Resources enable; resources create capacity. Resources can be physical, personal, social and/or informational.

Note: When this document suggests that each goal has one or more *relevant resources*, and resources support goals, this does imply that goals are always related (at least indirectly!) to goals. That intentional relativity is fine for most practical purposes, but could seem to create a bottomless “rabbit hole” without this further context: goals can, when necessary, be practically “reflected” to relate to themselves. For example, the goal “I seek enlightenment” can be interpreted as “I want to develop a resource of *enlightenment* which sustains my state of enlightenment.” Such reflectivity enables us to avoid the potentially endless creative iteration of *goal upon goal upon goal*.

With that in mind, let’s just focus here on *topics* and their *relevant resources*, and see how far we can practically go with them!

Formal & informal projects

Note that “existing project” here does *not* imply formality, although relevant resources should be directly associated with official projects (including collectives and companies) whenever applicable. “Existing project” can be as simple as “I want to lose weight” or “I want to go to this year’s convention”, etcetera. Create new official projects, whenever desired, using [Modular Organizing Recipe](#) or another methodical practice.

Participation-Types

Distinguish participation-types if needed, per the types below. These distinctions can have a direct effect on communications, including implementation of any policy such as [Advice Protocol](#):

1. Collaborators: Collaborators work together on a mutually shared goal with the intention of creating one or more specific products together. Collaboration creates shared investment, to a greater or lesser degree, and this often requires personal trust and/or systematic accountability. **Collaborators should be part of any decision-making processes.**
2. Consultants: Consultants are requested to provide creative advice. The invitation may apply to an entire goal, or it may be focused on specific components or traits of the goal.
3. Testers: Testers are invited or requested to test prototypes or products.
4. Commentators: Commentators are invited to comment upon (and potentially discuss) a goal without being directly requested to provide advice or testing.

Implicit use-cases

If use-cases are implicitly and clearly defined by the nature or the description of the resource, there's no need to separately distinguish them. For example, this includes automated services, such as a tutorial which automatically opens whenever someone clicks on a website's "Help" button, etcetera.

Sufficiently defining motivations

Per [A1](#), goals and motivations can always be related to goals, but there's no need to either "go down the rabbit hole" nor to create self-referential goals in pursuit of defining your motivations. You simply need to define them sufficiently to *satisfactorily motivate any [intended collaborators](#)* and, if applicable, future [users](#) of the resources in question. Try to keep your self-assessment as simple, clear and relevant as possible.

Developing motivations separately

If your motivations ever seem equally or more important than your current goal, you can use them to identify an *issue* in a [developmental staging](#) system, or a topic for discussion, with or *without* formally linking that to your current goal.