

Five Step – Five Year Planning document

Resource supplied for PEPA Mentors from the PEPA Mentor Hub



PEPA Program of Experience in the Palliative Approach

PEPA Indigenous Program of Experience in the Palliative Approach



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Five Step - Five Year Planning Document

Five-year plans were first evidenced in politics when Stalin created a five-year plan to advance the industrialisation and economy of the Union of Soviet Socialist Republic (USSR).

This five-year plan is not about advancing a nation, but it is about advancing you the person who completes it. The importance of a five-year plan is to honestly create a commitment to where you want to be in five years. Many may think that this is too much and that they are fine and will trust the organisations they work within to get them to their future version of themselves when it seems to be the right time to be there. That is OK. If this is you then read no further and I wish you well as you float along the river of life that will take you to the places you are comfortable to be in.

If you are still reading now, then you must have your oars at the ready to learn then understand how you will get along the river and at what speed? Literature tells us how making goals and then planning these goals achieve outcomes. We know this and yet many of us are not doing this. Why? **Take a moment now and ask the question...** *'Why don't I have a five-year plan?'*

Answer: - *Examples-* Didn't know I needed one, no one has really ever talked to me about it before, didn't know how to do one,

Next question – Are you the master of your destiny?

Next question – How were you planning for the future before now?

Not having a plan is a very REACTIVE way to live (you prefer to respond to problems after they happen) – and a five-year plan changes all that so you can be PROACTIVE and take back control (reduce the risk of problems that can occur because you have planned for them). Now that I have you thinking lets gets on with the five-year plan. Let's start at the beginning!

Your Name: _____

Today's Date: _____

Today's date is important as when you come back to reflect on this document this date will become a touchstone for your growth and a reminder of who you were when you started your growth journey.

I agree that in this plan I will commit to supporting myself to be the next best version of me.

Signature: _____



The Benefits of a five-year plan

Creating a five-year plan can pay dividends to support you to navigate where you want to be in the future.

- It helps to **create focus on what your priorities are**
- It helps you **say no to things** that won't help you reach your goals
- It shows you **where you need to make change, what's possible** etc.... so you don't end up overwhelmed and unable to achieve anything at all
- It helps you to be **less reactive** in life which takes away your control
- It **gives you motivation** to get where you want to go.
- It helps you **track each year** whether you are on course, whether things need to change to another course – and you can take control properly
- Helps you find **more energy**
- Increases your **positive vibrations/spirit** in your life which has a cascading effect onto the world you live in
- You're **more likely to achieve** what you want if you are planning to get there...

Of course, there will always be things that crop up unexpectedly – that's life – but overall, the major life changes and the smaller ones too, can be tracked and achieved with some forward planning.

Be aware though that as you change and gain more energy and become more positive from the control you have over your life that people around you will notice. You will find yourself naturally gravitating to new people who are positive and like-minded. You will seek out people you can learn more from and who will further support your growth and change. BUT be aware.... There will also be the unsupportive, these people are existing friends, colleagues, and family. They may not be supportive, and they may try to get you back to being the old you as your change may make them see what they are not doing. Your positive change may be a challenge to their negativity, and they may be negatively reactive to your positive change and growth. How you respond to these unsupportive people is for you and your spirit to decide. As a mentoring type personality I think that you would take a compassionate path to politely leave them with their feelings????

Now we know the WHY of a five-year plan let's take the next step and get to the HOW.

Step One

Who are you in five years? Dream a little – but ensure it aligns with what can be achieved and what aligns with your values. For example, you would not plan to be a football star if you are 50 and never played football.



These are points which may help you to get an ultimate decision. Every time you answer one of these questions you need to justify your answer. Example - I will be married with 4 children and 2 cats as ever since I was 5 this was my dream and it's non-negotiable.

Socially

What will be my relationship (married/single/divorced/open) (with or without animals/children)?

What would I want my social life to look like? (busy with a few friends/less busy with more quality of support?)

Where will I be living?

Emotional

Who will support me to achieve my goals (who is in my current circle of people – quietly reflect – think about all the people you have in your life from work, family, friends etc... Then think who are the **supportive - positive** people)?

Who do I need in my life to support me to achieve my goals (who is not currently in my circle of people and who do I need to invite in)? **Note:** This may be where you think about a mentor for yourself.

Who **will not** support me to achieve my goals (who is in my current circle of people – quietly reflect – think about all the people you have in your life from work, family, friends etc... Then think who are the **unsupportive - negative** people)?



How can I distance myself from people who do not support me (what are some default strategies I can use to keep these people from taking my energy)? **Note:** Be mindful that we often have negative people in our life that we may not be able to move on from BUT ask yourself - how can I STOP them from taking so much of my energy from me?

How does me being the best version of me benefit the world around me (what/who can I support as the new version of me develops)? Example – volunteer groups, community groups etc....

Wellbeing

What level of health and exercise will I need to maintain to support me to be the best version of me – to have the energy I need to be me?

What hobbies do I have that support me to nourish by positive energy to keep being me? **Example:** it may be yoga, walking, painting, renovating???. Everyone is different.



What level of income will I need to maintain this new version of me? **Note:** If your goal is about work then you need to check in and see what the role you want pays so you can be sure that it will maintain the life you want to maintain.

What new skills may I need to develop so I can achieve my goal? **Note:** if you are going to be a CEO – do you have an MBA? Do you need to go back to study to achieve your goal?

How will I look and feel when I achieve my goal? **Note:** This is a visioning exercise – you can draw an image, take a an existing picture from the media, photoshop your own image – the sky is the limit! This is your imagination/ your creation – I will leave it with you. This is what you will look and feel like in 5 years if you follow your plan – so it's up to you how you look and feel.

Create your vision /image here!



You now have a long-term plan to aim for. Be Kind to yourself – this is not written in stone and you can change some of these answers as they will change as you change. Remember you are growing!!!!

Step Two

Let's break it down – lets manage this – make action happen.

Use this table to develop your action plan. Plan for each goal identified. This will help you monitor your progress at Step Four.

Goal To be achieved	Tasks/Action/Steps To support you to achieve your goal – step it out in small achievable chunks	Resources Required What time /support /finances do you need for action?	How do I know I am successful? What are the goal posts that you measure achievement of your goal against?
Example: Emotional GOAL Reduce amount of time given to negative speak	<ul style="list-style-type: none"> - Notice when I have negative thoughts and ask myself 'why I am having them?' - Reduce engagement in conversation with others who speak negatively. - Notice others who attract positive speech and mindset practices - Notice how they interact with others to navigate positive conversations - Learn more about how to generate positive speaking and mindsets for everyday practice. 	<ul style="list-style-type: none"> - Know this is a change of habit – will take a minimum of 28 days - then ongoing practice and monitoring for 60 days to create change. - Lean on the positive people around me for support. - Initially avoid the negative attractants in my life until I gain control of my positive mindset. - Find podcasts that support my positive mindset and listen daily. 	<ul style="list-style-type: none"> - I can see my thinking shift to the positive. - I notice that my shift in judging people is notably reduced. - I can let negative people be negative and walk away. - I feel positive in my world. - I see the benefit of my positive nature making my work easier. - People around me notice my positivity and comment on it. - Negative people are around me less.
Overarching GOAL			



Social goals			
Emotional goals			
Wellbeing goals			



Other goals			
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Step Three

Just Do IT! (NIKE is so good at this)!

Start making this action plan happen. Have it with you wherever you go so when you feel yourself drifting away from it – you re read it and then get back on track.

Be kind to yourself. A change takes time and energy, and it is scary! The emotional energy that change takes out of you is often why people don't change.

If you are human and have a bad day or week and drift away from your plan – say to yourself.

THAT IS OK! BUT “If it is to be, then it is up to me” (William Johnsen)!

“Patience and persistence are the keys... The keys to unlock doors of success... With these two virtues, you grow in reasoning and experience.” (Ogwo David Emenike)

Step Four

Review IT!

If this is your first plan, I would encourage you to check in with it every 6 weeks to see if you have been realistic with your goals and your time frames. At first when we begin making plans for change, we are ambitious – this is your superpower – however remember the plan can change. Life happens!!! Births, deaths, marriages, divorces, and taxes etc... - you get the picture. You are the master of your destiny – the lead actor of your own life movie – so you can change the goal posts. **BUT REMEMBER** only make change because it is more positive for you and supportive of your goal.

Once you feel that the plan is achievable you should check in with the plan and yourself every six months. It is vital for a plan to work that we keep connected with it. **Ask some crucial questions.**

What is working?



Reflect on the previous answer (in the previous question). – WHAT is it that you have started to change that you are proud of?

How will you celebrate what you are proud of?

Where have you lost focus?

What do you need to change with your plan?

If you have lost connection with your plan, why do you think that is? (**Note:** losing connection to your plan can happen if you have set goals that are not aligning with your values or that are unrealistic based on your current circumstances. May be the steps to achieve the goals were not possible? **Review the plan.** What can you rethink in your plan to get the connection back? Do you need to consider another review of your values to check in what they are? Repeat a values assessment if you need to).



Rewrite your plan to accommodate what you have noticed!

Goal To be achieved	Tasks/Action/Steps To support you to achieve your goal – step it out in small achievable chunks	Resources Required What time /support /finances do you need for action?	How do I know I am successful? What are the goal posts that you measure achievement of your goal against?
Overarching GOAL			
Social goals			



Emotional goals			
Wellbeing goals			
Other goals			



Step Five – The FINAL Step!

Take every created /reviewed plan and share it with the people closest with you who will support you to achieve your goals.

Congratulations! You have taken the largest leap to achieving what you want from your life – whatever it may be – on your terms.

Who could you mentor and inspire to complete their own five-year plan?

You will gain more energy for yourself when you inspire others to grow themselves. Mentoring is a pay forward system within a growing community. How can you inspire someone in your community?

