



# Metacognitive Skills

## Setting Goals and Making Plans

Secondary



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## SETTING GOALS AND MAKING PLANS

Setting goals and making plans is a skill that helps students set short and long-term goals, create timelines or blueprints, monitor progress, and make necessary adjustments.

Introduce the skill of setting goals and making plans using the video lesson or an introduction of your own design that covers the same content. The text of the recording is below:

**Video script** -- Have you ever wanted to accomplish something but weren't sure how to get started? Or have you ever found yourself giving up on a task because you didn't have a clear plan? Maybe you wanted to improve your grade in a class, make a sports team, finish a big project on time, or build healthier habits like getting more sleep. That's when the skill of Setting Goals and Making Plans can set you up for success.

This skill helps you set short-and long-term goals, create a timeline for accomplishing them, monitor your progress, and adjust your plan when you need to. It's not just about making a to-do list—it's about knowing what you want to achieve and mapping out how you'll get there.

Here's a strategy you can use for setting goals and making plans:

1. Ask yourself if this is a situation where you should be setting goals and making plans.
1. If yes, write down your goal and identify when you plan to accomplish it.
2. Regularly imagine yourself accomplishing your goal.
3. Identify a set of steps you will take to accomplish your goal.
4. Periodically, determine if you have to revise the steps you have identified.
5. Occasionally, review your goal to see if you should change it.
6. When you've reached your goal or have stopped working on it, identify which of your actions worked and which didn't work.

Here's an example of someone using this strategy:



Cole's history grade has dropped, and he is unhappy about it. He really wants to improve his grade, but he's not exactly sure how to do it. He decides to set a specific goal and make a plan.

He sets a goal to raise his grade to a B+ by the end of the semester, which is 4 weeks away. He writes down his goal and looks at the gradebook portal. He realizes he's been losing points on short-answer questions, and also that some of his assignments are late. He uses this information to create a plan. For the incomplete assignments, he promises himself that he'll check the gradebook every night to make sure he's on top of due dates and doesn't forget anything. To get better at short-answer questions, he'll start by asking his teacher for an example of what a strong response looks like. Then he'll revise two of his past answers to make sure he explained his thinking clearly and used evidence. Finally, he'll ask for feedback to see how he can keep improving.

Each week, he checks his progress to see whether his scores are improving and whether he's turning everything in on time. After the first week, he notices he forgot to include text evidence in one of his responses, so he adds a new step to his plan. He will highlight the explanation sentence and make sure it clearly connects his evidence to his answer. These small adjustments help his work improve. By the second week, his short-answer score is noticeably higher.

By the end of the semester, Cole hasn't turned anything in late, and his grade is a B+. He's proud of how far he's come. Setting a goal and taking action steps to reach it really helped.

Setting goals and making plans is useful outside of school as well. Here's an example. Amy has been feeling tired and run-down during soccer practice, and it's starting to affect her ability to focus. She decides to set a goal to take better care of herself by eating healthier and getting more sleep. She writes down her goal, chooses a realistic weekly routine, and makes a simple plan. She will allow a few extra minutes in the morning to pack a healthy snack to eat before practice. She'll also set a consistent bedtime. After the first week, she realizes she doesn't have time to pack snacks in the morning, so she adjusts her plan. She will pack them the night before. Over the next few weeks, she notices she has more energy and feels more focused during soccer practice.



Whether in school or outside of school, setting goals and making plans helps you decide what you want to accomplish, choose a path to get there, and adjust when things don't go as expected. As you practice this skill, you'll get better at noticing when you need a plan, creating steps you can follow, and checking in on your progress. Over time, you'll feel more confident guiding your own work and following through on the things that matter to you.



Once students have been introduced to the skill of setting goals and making plans, emphasize the following points with them:

- Setting goals and making plans means deciding what you want to accomplish and intentionally mapping out how and when you will work toward it. Discuss with students using prompts like, “What is the difference between wanting something to change and setting a clear goal to make it happen?”
- This skill is especially useful in situations where success depends on sustained effort over time, such as improving academic performance, completing long-term projects, or building habits. Discuss with students using prompts like, “When have you needed more than just effort to succeed, but also a plan?”
- Recognizing when you do not have a clear goal or plan is an important first step in using this skill. Discuss with students using prompts like, “How can you tell when you’re working without a clear plan?”
- Setting an effective goal involves clearly defining what you want to achieve and identifying a realistic time frame. Discuss with students using prompts like, “How did Cole make his goal specific and measurable?”
- Imagining yourself accomplishing your goal can help you stay motivated and focused over time. Discuss with students using prompts like, “How might picturing success help you keep working when a goal feels challenging?”
- Making a plan means identifying specific steps you will take to move toward your goal rather than hoping improvement will happen on its own. Discuss with students using prompts like, “What steps did Cole identify to improve his short-answer responses?”
- Monitoring your progress helps you notice what is working and what is not as you follow your plan. Discuss with students using prompts like, “How did Cole check whether his plan was helping his grade improve?”
- Revising your plan when needed helps you respond to obstacles instead of giving up. Discuss with students using prompts like, “What change did Cole make to his plan after noticing a mistake in his work?”
- Reviewing your goal occasionally helps you decide whether it still makes sense or needs adjustment. Discuss with students using prompts like, “Why is it important to revisit a goal instead of sticking with it automatically?”
- Reflecting on your actions after reaching a goal helps you understand which strategies were effective and which were not. Discuss with students using prompts like, “What did Cole learn about himself from setting goals and following a plan?”



## LEVELS OF COMPETENCE

There are specific levels of competence for this skill against which students can be evaluated (see **Table 1**). It is important to note that the levels of competence are articulated as a scale that can be used to make judgments about students' status and growth. That scale has score values that range from 0.0 to 4.0. At the 0.0 level, the student cannot demonstrate any part of the skill even with help. At the 1.0 level, the student can perform some of the foundational aspects of the skill with help but not independently. At the 2.0 level, the student can independently demonstrate the foundational aspects of the skill but not the behaviors described at the 3.0 level. The 3.0 level on the scale represents proficiency in the skill. When students can independently demonstrate these behaviors, they have reached the desired status for the skill. At the 4.0 level, the student demonstrates everything at the 3.0 level AND goes above and beyond expectations by adding useful adaptations to the skill. Finally, the scale describes half-point scores that indicate partial progress toward the next level of the scale.

Periodically evaluate students' status relative to these levels of competence using the assessment activities in **Table 4**.

It is also important to note that **Table 2** and **Table 3** contain versions of the scale that can be used by students to rate themselves. These scales are both stated in an "I CAN" format. Periodically, students evaluate themselves relative to the levels of competence using the Full-point or the Half-point self-evaluation scales.



**Table 1: Levels of Competence**

4.0	The student can articulate specific situations (in school and outside of school) in which they should set goals and make plans, and evaluate progress.
3.5	In addition to score 3.0 performance, partial success at score 4.0 content.
3.0	The student will recognize when they are not setting goals and making plans, and respond by executing a complex strategy involving self-analysis.
2.5	No major errors or omissions regarding score 2.0 content, and partial success at score 3.0 content.
2.0	<p>The student will recognize or recall vocabulary associated with self-analysis as it relates to setting goals and making plans (for example, <i>adjustments</i>, <i>progress-monitoring</i>), and perform basic processes such as:</p> <ul style="list-style-type: none"> <li>● Describe a complex strategy involving self-analysis for setting goals and making plans (articulated by the class or the teacher in the form of a standard operating procedure [SOP]). For example: <ul style="list-style-type: none"> <li>● Ask yourself if this is a situation where you should be setting goals and making plans.</li> <li>● If yes, write down your goal and identify when you plan to accomplish it.</li> <li>● Periodically, imagine yourself accomplishing your goal.</li> <li>● Identify a set of steps you will take to accomplish your goal.</li> <li>● Periodically determine if you have to revise the steps you have identified.</li> <li>● Occasionally, review your goal to see if you should change it.</li> <li>● When you have reached your goal or have stopped working on it, identify which of your actions did and did not work.</li> </ul> </li> <li>● Understand what an individual might think and feel while setting goals and making plans (for example, feeling excited or inspired; thinking, “What steps do I need to take to reach my goal?”)</li> </ul>
1.5	Partial success at score 2.0 content, and major errors or omissions regarding score 3.0 content.



1.0	With help, partial success at score 2.0 content and score 3.0 content.
0.5	With help, partial success at score 2.0 content but not at score 3.0 content.
0.0	Even with help, the student demonstrates no success.



**Table 2: I CAN Student Assessment Form (Half-point scale)**

4.0	I can articulate specific situations (in school and out of school) in which I should set goals and make plans, and evaluate my progress.
3.5	In addition to score 3.0, I can do some of what is required at the score 4.0 level.
3.0	I can recognize when I am not setting goals and making plans, and respond by executing a complex strategy involving self-analysis.
2.5	In addition to score 2.0, I can do some of what is required at the score 3.0 level.
2.0	<p>I can recognize or recall vocabulary associated with self-analysis as it relates to setting goals and making plans (for example, <i>adjustments, progress-monitoring</i>), and perform basic processes such as:</p> <ul style="list-style-type: none"> <li>● I can describe a complex strategy involving self-analysis for setting goals and making plans (articulated by the class or the teacher in the form of a standard operating procedure [SOP]). For example: <ul style="list-style-type: none"> <li>● Ask yourself if this is a situation where you should be setting goals and making plans.</li> <li>● If yes, write down your goal and identify when you plan to accomplish it.</li> <li>● Periodically, imagine yourself accomplishing your goal.</li> <li>● Identify a set of steps you will take to accomplish your goal.</li> <li>● Periodically determine if you have to revise the steps you have identified.</li> <li>● Occasionally, review your goal to see if you should change it.</li> <li>● When you have reached your goal or have stopped working on it, identify which of your actions did and did not work.</li> </ul> </li> <li>● Understand what an individual might think and feel while setting goals and making plans (for example, feeling excited or inspired; thinking, “What steps do I need to take to reach my goal?”)</li> </ul>
1.5	On my own, I can do some of the things at score 2.0 level.



1.0	With help, I can do some of the things at score 2.0 level and 3.0 level.
0.5	With help, I can do some of the score 2.0 level things but not the score 3.0 level things.
0.0	Even with help, I cannot do any of the score levels.



**Table 3: I CAN Student Assessment Form (Full-point scale)**

4.0	I can articulate specific situations (in school and out of school) in which I should set goals and make plans, and evaluate my progress.
3.0	I can recognize when I am not setting goals and making plans, and respond by executing a complex strategy involving self-analysis.
2.0	<p>I can recognize or recall vocabulary associated with self-analysis as it relates to setting goals and making plans (for example, <i>adjustments, progress-monitoring</i>), and perform basic processes such as:</p> <ul style="list-style-type: none"> <li>● I can describe a complex strategy involving self-analysis for setting goals and making plans (articulated by the class or the teacher in the form of a standard operating procedure [SOP]). For example: <ul style="list-style-type: none"> <li>● Ask yourself if this is a situation where you should be setting goals and making plans.</li> <li>● If yes, write down your goal and identify when you plan to accomplish it.</li> <li>● Periodically, imagine yourself accomplishing your goal.</li> <li>● Identify a set of steps you will take to accomplish your goal.</li> <li>● Periodically determine if you have to revise the steps you have identified.</li> <li>● Occasionally, review your goal to see if you should change it.</li> <li>● When you have reached your goal or have stopped working on it, identify which of your actions did and did not work.</li> </ul> </li> <li>● Understand what an individual might think and feel while setting goals and making plans (for example, feeling excited or inspired; thinking, “What steps do I need to take to reach my goal?”)</li> </ul>
1.0	With help, I can do some of the things at score 2.0 level and score 3.0 level.
0.0	Even with help, I cannot do any of the score levels.



**Table 4: Assessment Activities**

4.0	<p>Ask students to document specific situations, both in and out of school, in which they've used the skill of setting goals and making plans. They should be able to describe the goals they set for themselves, what they did, and how well they performed.</p>
3.0	<p>Have students document a time they used the skill of setting goals and making plans. They should be able to provide a detailed description of the event and a critique of their own behavior.</p>
2.0	<p>Ask students to explain the following terms: <i>adjustments</i>, <i>progress-monitoring</i>. Their answers should be generally accurate but not necessarily detailed or complete.</p> <p>Ask students to describe a basic process that has been provided to them for setting goals and making plans. Their descriptions should include explicit steps such as:</p> <ul style="list-style-type: none"><li>● Ask yourself if this is a situation where you should be setting goals and making plans.</li><li>● If yes, write down your goal and identify when you plan to accomplish it.</li><li>● Periodically, imagine yourself accomplishing your goal.</li><li>● Identify a set of steps you will take to accomplish your goal.</li><li>● Periodically determine if you have to revise the steps you have identified.</li><li>● Occasionally, review your goal to see if you should change it.</li><li>● When you have reached your goal or have stopped working on it, identify which of your actions did and did not work.</li></ul> <p>Ask students to describe some of the self-talk and thinking that should occur when someone is setting goals and making plans. Their answers should include things like they are feeling excited or inspired and thinking, "What steps do I need to take to reach my goal?"</p>

