Planning Tool 2:

**Developing Useful Goals**

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|  | Why is it important to set goals?* Establishing clear goals from the outset can help shape an outreach initiative and guide decision points throughout the design process.
* Those goals also provide a framework for determining how to assess the effectiveness of a new outreach campaign.
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|  | How will your team set goals using collaborative activities today?

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| **Step 1**Discuss current data and outreach activities |  | **Step 2** Brainstorm basic goals |  | **Step 3**Categorize and condense the goals |  | **Step 4**Prioritize the goals |  | **Step 5**Ensure the goals are useful by making them SMART |

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**Goals for targeted outreach to adjunctively eligible families could include things like:**

* **Increase** the share of Medicaid/SNAP participants enrolled in WIC by \_\_\_.
* **Modernize** outreach processes by \_\_\_.
* **Improve** the efficiency of enrollment processes by \_\_\_.
* **Simplify** WIC certification for eligible families by \_\_\_.
* **Build** relationships across programs by \_\_\_.
* **Strengthen** data sharing and matching practices by \_\_\_.

**Step 1. Discuss**

Spend a few moments discussing with your colleagues the current outreach activities that you outlined using Tool 1.

* **Where are there gaps or opportunities?**
* **What would you like to see changed or improved?**
* **What is working well and could be expanded to new areas or populations?**
* **Whom are current strategies missing?**
* **How can you use data to help you?**

**Step 2. Brainstorm Basic Goals**

Using the table below, your group can collaboratively draft goals for WIC outreach. Participants can each take a “sticky” (yellow text box) and double-click in it to type their ideas. Then they can drag the sticky to the "white board“ in the middle of the page. Stickies can be resized; they can also overlap and be stacked together. If you need more stickies, you can copy and paste the ones from the bottom of your board. Customize the question at the top of the whiteboard as needed. Feel free to change the shapes and colors of your stickies and change your fonts…. Have fun!

**Brainstorm Collaboratively:**

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| **What are your goals for WIC outreach?** |
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**Step 3. Categorize Your Goals**

Next, identify redundancies and overlapping ideas by categorizing them. Copy the goals into the table below, sorting into rows. You can add columns and categories if needed.

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| **Category** | **Example Goal** | **Your Goals** |
| Data  | *Establish cross-program data sharing agreement* |  |
| Outreach | *Begin using text message for WIC outreach*  |  |
| Impact  | *Increase WIC coverage rate by X percent*  |  |
| Other:\_\_\_ |  |  |
| Other: \_\_\_ |  |  |
| *Add new rows as needed…* |  |  |

**Step 4. Prioritize Your Goals**

Now look at the goals in each category in Step 3 and ask:

* Can we combine, condense, or eliminate individual goals within categories so there is no redundancy?
* What goals are possible to achieve, given the resources available?

In the space below, record the goals that will be kept and used to shape the program. They will be needed in the last step!

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| **Goal #** | **Final Goal from Step 3** |
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**Step 5. Edit Your Goals to Make Them SMARTer**

Now that you have a list of ideas, you may need to make some tweaks to ensure they are useful, actionable, and specific. A common formula for this type of goal setting is the SMART formula. SMART goals are:

* Specific
* Measurable
* Attainable
* Relevant
* Time-bound

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| **Make your goals SMARTer by considering these questions:** |
| **Specific** goals include the who, what, and where: | * Who must be involved for it to be successful?
* What objective needs to be accomplished?
* Where is this goal to be achieved?
 |
| **Measurable** goals have criteria that help you know if you are making progress: | * What steps will be taken to achieve it?
* What does progress look like?
* What metrics will be used to measure success?
 |
| **Attainable** goals consider what you need in order to be successful by answering questions like: | * Do I have the resources needed to achieve this?
* Have others done something similar before?
 |
| **Relevant** goals can realistically address a problem:  | * How is this goal aligned with overall objectives?
* Is the goal reachable, given the time and resources?
 |
| **Time-bound** goals have a start and an end: | * Does the goal align with overall objectives?
* How will I know when we have been successful?
 |

**SMART Example:**

**Goal: I would like to become a better runner.**

To make this SMART, you could add the following elements:

* **Specific:** I’m going to start running and training for a marathon.
* **Measurable:** I will run at least three miles a day, or a minimum of 20 miles a week.
* **Attainable:** I have done some running before, my body is reasonably healthy, and the marathon is six months from now.
* **Relevant:** I want to become a fit, healthy, and strong person — I want to be full of vitality, energy, and zest for life!
* **Time-bound:** I have signed up for a marathon six months from now.

Thinking about the example you just saw, what can you add to improve your goals?

* What needs to be more specific?
* Can you add ideas for measuring success?
* Try it below!

**Now look over the goals you prioritized in Step 4.**

* Select the ones that you plan to use to construct your outreach plan.
* Copy those draft goals and paste them onto the table here.
* Using what you just learned, spend some time editing the goals to make them specific, measurable, attainable, relevant, and time-bound.

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| **Goal #** | **SMART Goal** |
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