

Setting an Aim, Goals, Drivers, and Milestones

Path to Zero, Fall 2023

Purpose

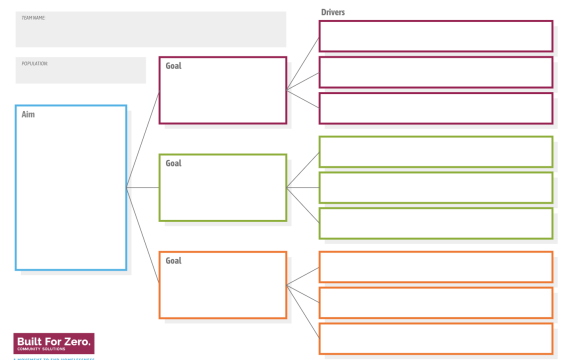
This guide will support you to set an aim, goals, drivers, and milestones and begin to build out your driver diagram.

Why Do This?

- Inspirational value
 - Everyone in the community understands what our community is trying to do
 - The power of writing goals down and telling others
- Practical value
 - A strong aim provides clarity, feels challenging, inspires commitment, sparks opportunity for co-designing, and reflects the task at hand
 - Goal, milestones, and drivers give direction to your work

Driver Diagram

- The driver diagram is the **map for your entire road trip**. It's your comprehensive logistics document for the next 6 months.
 - Driver Diagrams are not meant to map everything that will happen between now and Functional Zero, just this section of the trip based on what you know now. Goals, Drivers, and Milestones are intended to be revisited and updated every six months
- Driver diagrams demonstrate the connection between the work we are doing today and the aims we have set for down the road.



Facilitation

For in-person facilitation:

We recommend having printed driver diagrams (or sheets of paper organized as a driver diagram) available for your team to fill out as you come to agreement on AIMS, GOALS, and DRIVERS during your meeting.

For virtual facilitation:

We recommend using a collaborative space ([example here](#), please make a copy!) to contribute to and map out your driver diagram.

Setting an Aim

- Setting an aim is like **choosing a destination**. It is the long-term, audacious, transformative thing you are trying to achieve.
 - *ie., we will achieve functional zero for veterans by October 2026*
 - *ie., we will achieve a 15% reduction in chronically homeless individuals by March 2025*
- If your aim doesn't scare you, it isn't big enough.
- As you work to set an aim, think: *what is the end goal of our system's work?*
 - HINT: your aim should be either a Functional Zero goal or a reduction goal

Facilitation

1. After defining what an AIM is and answering any questions about the current state of your system, instruct each participant to write the AIM they would set for the community on a sticky or note card.
2. Instruct everyone to keep these private until instructed to share.
3. Once everyone has written their AIM down, instruct them to reveal the AIM they propose.
 - a. For virtual groups, this is a great opportunity to use a chat waterfall. Instruct everyone to type their answer in the chat, but wait to press send until instructed.
4. Go around (in large or small groups) and have participants share the AIM they set and why
5. Use the responses to facilitate a conversation and come to consensus on a final aim
6. Write the community AIM on the driver diagram

Setting a Goal (6 months - 1 year)

- Goals are the **things you hope to achieve on your trip** and which will make your journey to your aim successful.

- While there may be many different things you want to achieve, focus on 2-3 goals at a time
- Ultimately, goals help you achieve your aim. They are **short term, actionable,** and **immediate.**
 - "We will achieve quality data by <date>"
 - "We will increase the monthly rate of permanent housing placement from <baseline> to <number> for <population> by <date>"
 - "We will permanently house <number> <population> by <date>"

Facilitation

1. Have participants get into groups of 2-3 (utilize breakout rooms for virtual facilitation).
2. Instruct each group to identify 3 things they believe stand in the way of achieving Functional Zero in your community.
 - a. A helpful reminder: at this point we don't need to know how to remove these challenges, just that the challenges exist.
 - b. Examples: long length of time, lack of/unreliable BNL, high returns to homelessness etc.
3. Write each item on its own sticky or note card.
4. Share out challenges and group challenges that are the same or similar to one another.
5. If the group had to choose 3 just three of these challenges to focus on first, what would they be?
 - a. **HINT: Be mindful of where community energy is at when choosing what challenges to focus on, especially in the beginning!**
 - b. Some teams choose to focus on the challenges that seem the biggest or that will have the most impact on their AIM. Some teams will choose to focus on the challenges that seem like the lowest hanging fruit. Some teams will prioritize challenges that are having the most adverse effects on neighbors experiencing homelessness. Some will choose a mix. It all depends on the context of the community.
6. How will we know a change is an improvement?
 - a. What type of measurement can we implement so that we can say with confidence that we have made a positive change to the challenge we have identified?
 - b. Examples: We will have quality data by <date>; We will increase the monthly rate of permanent housing placement from <baseline> to <number> for <population> by <date>
7. Voila! our fantastic team has set goals!! Write down each of your goals in your driver diagram

Establishing Drivers (3-6 months)

- Drivers are the specific, actionable things you'll do in order to achieve your goals.
- They are the **nitty gritty of your goals and outline how you'll achieve your goals.**
- While your aim might be years away, your drivers should be achievable in the next 3-6 months. They are your improvement projects.
 - Example: If my goal is "We will decrease exits/returns to homelessness by 20% for Veterans by June 2024" what activities (drivers) need to take place towards reaching that goal?
- Drivers can also be needing more information!! Do we know all we need to know in order to try a change?
- **HINT: While drivers are action oriented/nitty gritty, they are still more broad than PDSA cycles or smaller tests of change.**
 - **ie., your driver is "standardize housing stability case management across programs" and your PDSA's/tests of change outline the activities that occur in order to get there (more on PDSA's below)**

Facilitation

1. If you have a large group divide the group into one smaller group per goal. If you have a smaller group you can do this one goal at a time with everyone.
2. Assign each group a goal that they will be focusing on.
3. Have each group come up with a list of either:
 - a. All the reasons that challenge exists within the community
 - b. The things that would need to occur to achieve your goal
4. Use this list to start narrowing in on 3-4 drivers that will support you in reaching your goal
 - a. This is the point in the process that you should be prepared for the common traps (ie., "more units" or "more money") to be listed as the drivers that would have the biggest lift. While that is most likely true, they aren't helpful drivers unless we make sure that they are *specific* and *actionable* within our 3-6 month timeline. Your drivers should be explicit about what you'll *do* (try: "in order to bring more units online, we'll...").
5. If you split into groups, have each group share out the drivers they selected for their goal with their thinking around it. Provide space for questions or feedback from other groups until consensus is reached.
6. Record the final drivers on the diagram.

Celebrate!!!

Pause here for a minute. Your team just completed your Driver Diagram—that is HUGE! Before you move onto setting Milestones, take a moment to soak in the map that you created together. This is an invitation not to think about all the work that is ahead, but

that your team is now on the same page. You know where you're going and have a sharper sense of how you might get there.

A quick note on PDSA's:

PDSA cycles stand for **Plan, Do, Study, Act** and are the elements of improvement science that support us to answer "what change can we make that will result in an improvement to our system?" Using small tests of change (<1 month), we test our theories about what would result in an improvement. We use a PDSA cycle to adapt, adopt, or abandon our ideas about what might lead to an improvement in our system and help us achieve our goals.

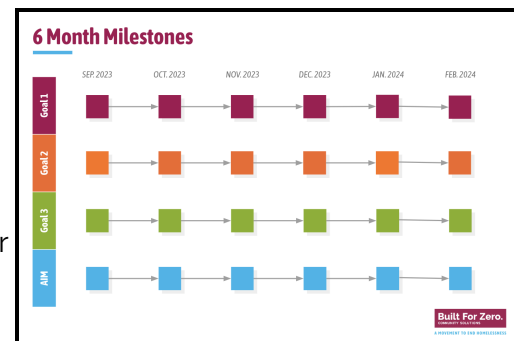
What is a PDSA?

A time-limited test of change to a community's system

- Specific, actionable, and measurable
- Involves testing one change idea at a time
- Quickly confirms a teams thinking about what needs to be done in order to achieve goals or leads them to pivot
- Keeps teams from getting stuck

Setting Milestones (every 6 months)

- Milestones outline where you want to be by when.
- They are **guideposts and indicators** that you'll use to check your progress on your way to your aim.



Facilitation

1. It is helpful to start setting 6 Month Milestones one goal at a time and then using the goal milestones collectively to inform your Aim Milestones.
 - a. HINT: Milestones should be ambitious enough to get the team moving towards reaching your goal, but also flexible enough to remain applicable to where you are in the process.
2. If you set a goal that will be accomplished in the next 6 months that is your end state
3. If your goal is set for more than 6 months out, where do you need to be in 6 months in order to reach your end state?

- a. It may be tempting to simply divide your goal by the number of months you have and use that as your milestones. Instead, think about if that is realistic to how change happens in your community. Often we see change happen slowly at first and then pick up speed as the work builds momentum.
4. Repeat for each of your goals
5. Using your goal milestones, set your Aim Milestones.