Socializing an Aim, Goals, Drivers, and Milestones

Path to Zero, Fall 2023

Purpose

This guide will support you in the process of socializing (creating awareness and building buy-in to your aims, goals, drivers, and milestones).

Why Socialize Your Aims & Goals

- When everyone is working toward a common aim or goal, you're more likely to reach the intended target easier, quicker, and more efficiently.
- You must identify the people you need on your team and motivate them to take action.
- Socializing aims and goals helps to hold everyone involved accountable to their role.

Levels of Buy-in

Guiding Coalition/Senior Leadership

The guiding coalition is made up of System Level leaders who, although not intimately involved in the day to day work, are essential to clear the path and share accountability for systems change. This group's buy-in is crucial for supporting stakeholder participation in processes to test and implement changes to the system as well as continuously understanding challenges and emerging problems. These leaders are responsible for:

- Setting shared system-level priorities and sponsoring aligned system changes and improvements
- Authority and influence to align resource allocations to priorities
- Visibly taking ownership of collective effort to reduce and end homelessness
- Sponsoring and clearing the path for improvement teams

Improvement Team

Made up of a mix of direct service providers, middle level management, and cross-sector partners, this group is tasked with developing and operationalizing changes and improvements to system processes. This group's buy-in is crucial because they or people

they work with will be carrying out tests of change and are responsible for day to day movement towards the aim and goals. The Improvement Team:

- Is empowered to test and make changes to system processes
- Is a mixture of front-line and program-level staffing
- Require team leads to convene and facilitate team processes (including accountability measures)

Establish Ground Rules

Organizational psychology tells us that individuals are able to engage more fully in feedback when the process for doing so is clear. One of the keys to building buy-in is creating a process where stakeholders are not just updated on a decision, but are invited into the process of review and adoption. As the facilitator, establish ground rules or a process by which feedback is received as a kindness, ensuring individuals' voices are heard and the best outcome is achieved.

Facilitation

1. Think intentionally about your ability to both facilitate and contribute to the meeting. If you have concerns, consider inviting a colleague to facilitate.
2. Circulate the agenda and action items to be reviewed for the meeting beforehand.
3. Establish your process for leading the discussion.
   a. What expectations do you have for participants during the meeting?
   b. What tools can be introduced to support the discussion?
      i. Examples: Parking Lots, ELMO, 1,2,4, all (Liberating Structures), etc.
4. Introduce or review ground rules/meeting norms at the top of the meeting.

Review Aims and Goals

Start by reviewing and contextualizing the aims & goals that your team has set so that stakeholders understand them. Consider both the context that brought decision makers to this aim/goal and the context that is important for stakeholders from their role in the system.

Facilitation

1. Start with framing.
   a. Know your audience (and what information is important to them) when framing the aim or goal that you are socializing.
2. Share the Aim/Goal
   a. In addition to naming the aim/goal outright, think about highlighting the What's In It For Me (WIIFM) for your stakeholder group.
3. Articulate why the group is important to achieving the Aim/Goal
   a. Why are these individuals or roles, in particular, important to moving the aim or goal forward.

Make Space for Stakeholder Discussion

In order to build buy-in toward the aim and goal you just shared, make space for stakeholders to share their worries, fears, and beliefs about the aim and goals. Allow them to engage in discussion around the aim and goals and be a thought partner to reflect back to them why the team believes in the aim and goals that were set.

Facilitation

1. Hold space for personal reflection
   a. Provide prompts or questions for individuals to briefly reflect on the aims and goals as well as the context before sharing out with the group.
   b. Example questions: What is your first reaction to the aim and goals presented? What is a fear you hold about the aim or goals presented? From your role in the system, what will be the biggest barrier to reaching our aim or goal? What is the biggest strength? What did we miss when setting the aim or goal? What is the greatest asset this group brings toward achieving the aim or goal?
2. Using the questions as guides, facilitate conversation around the aim and goals individually.
3. If conversation changes an aim or goal, how will other stakeholders be brought in? How does that change affect the rest of the Driver Diagram or Milestones?

Moving Forward

Leaving the meeting with a strong idea of next steps and roles and responsibilities is important to moving the work forward. When outlining action steps, think both about what you will need to do for the stakeholder and what the stakeholder will need to do for you.

Facilitation

1. Ask each group member to complete the following statements:
   a. I believe in homelessness is solvable in <insert community name> because <insert reason>.
   b. My role in championing the aim or goal going forward is <insert role>.
   c. Something I need to be successful in moving the work forward is <insert what they need>.
2. Group members share out statements and record action items where applicable.
3. Establish protocol for keeping everyone in the loop.
   a. How will updates on progress be shared?
   b. Will the whole group meet again?
   c. Will subgroups be needed?
4. Follow up and follow through.