

STARTING WELL

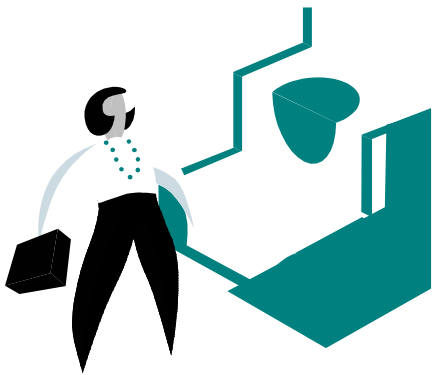
One of the first steps in implementing any program or initiative is to determine your goals and objectives before you get started.

Setting Goals and Objectives

A goal is a broad statement of purpose. Goals describe the desired long-term impacts of what you want to accomplish. Goals also allow you to know precisely when it is you can declare victory. Therefore, goals should be given careful consideration, as they will be the landmarks toward which you will direct your programming efforts. Goals can be tailored to meet the specific needs of your target population.

Objectives build on goals. Objectives are the specific changes expected in your target population as a result of your program. Your objectives should provide detailed information, including the months, dates, and times when you will offer the program.

The primary goals of the Small Business Wellness Initiative are to:



- *Provide prevention programs to high-risk small businesses, which typically do not have access to such programs, and encounter many barriers to implementation*
- *Determine the effectiveness of these programs, as well as those factors within small business settings that facilitate or diminish effectiveness*
- *Develop a strategic and aggressive outreach model by coordinating efforts of a nonprofit and community-based substance abuse resources center, a regional small business development center (SBDC), and a small research firm*
- *Develop a “Path of Assistance” service model that will provide regional SBDCs with resources to deliver prevention/health promotion programs to small businesses through local small business assistance centers*
- *Create a network of small businesses and provide an avenue to unite small business owners and community organizations interested in the wellness of the small business community*

Developing goals and objectives can be a challenging task and will demand a concerted effort on the part of your team. It is important that staff, prospective partners and funding agencies, as well as your target participants, understand the goals of and objectives of your initiative.

Some questions to ask yourself when developing goals and objectives include:

- Do the goals/objectives reflect your mission statement and purpose?
- Do the goals/objectives reflect the anticipated outcomes for the initiative?
- Do the goals/objectives provide a basis for evaluating the success of the initiative?

To be successful, your goals and objectives should be specific, measurable and realistic.

Specific-Goals and objectives that are specific may include dates and/or number of anticipated participants. A specific goal or objective can help evaluate the success of your program.

Measurable-Be sure to set a goal or objective that can be measured. If you can measure your goal or objective, you will know exactly when you have achieved it.

Realistic-It is important to set a realistic goal or objective that you can achieve. Don't set yourself or your initiative up for failure by creating unrealistic goals or objectives.

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Goals and Objectives Worksheet

What are the goals of your initiative?

What are the objectives of your initiative?

Write each objective below. Then check whether or not it is specific, measurable and realistic.

Objectives	Specific	Measurable	Realistic
<i>Example: Recruit 12 small businesses to participate in a workplace wellness program by end of Year 1</i>	Y or N	Y or N	Y or N

What are your desired outcomes?

What tools will be used to measure or evaluate the success of your initiative?

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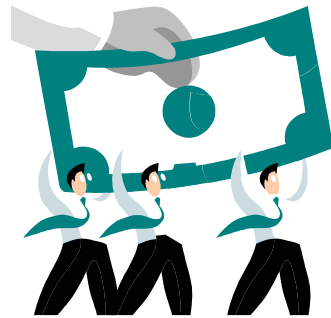
Evidence suggests that community collaborations are critical to building public awareness of an issue. Community collaborations can pay off in more ways than one.

Building Collaborations

Collaborating with other organizations or agencies not only help maximize your available resources, professional expertise and outreach efforts, but it can also increase your impact, build credibility and enhance your chances of success.

However, when you decide to collaborate with other organizations, remember that not just any partners will do. While the possibilities for collaboration are endless, you should consider selecting partners who share your mission or have similar goals. Potential collaborators could be your local chamber of commerce, a nonprofit organization or a local wellness firm. There are hundreds of organizations looking to collaborate with health promotion and wellness advocates. Your city or county public health departments are another possibility. A list of possible prevention partners can also be found online at: www.preventionpartners.samhsa.gov.

The Small Business Wellness Initiative was designed as a community collaboration between local prevention centers, small business development centers and wellness professionals. In our initiative, these constituencies were represented by:



- *Tarrant Council on Alcoholism & Drug Abuse, a local nonprofit agency with a drug-free workplace division and a mission to reduce drug and alcohol abuse in the community*
- *Organizational Wellness & Learning Systems, a private research/consulting firm that offers customized health promotion programs in the workplace and community*
- *North Texas Small Business Development Center, Technology Assistance, a regional center that offers counseling and drug-free workplace programs to small businesses*

Together, collaborators maximized available resources, professional expertise and outreach efforts.

You may decide that building a wellness coalition could be a beneficial way to meet your goals and objectives. Community Anti-Drug Coalitions of America (CADCA) offers a free technical assistance bulletin on coalition building. Visit CADCA at: www.cadca.org.

Keep in mind that collaboration can often be challenging, and conflict is inevitable in any group process with high stakes. Conflict resolution and consensus-building skills are often the keys to successful collaboration. Building trust is also essential. Other keys to building consensus:

- Relationship building and trust take time so have periodic discussions where partners can share grievances and praise.
- Organize around a common purpose and make the agenda reflect that purpose.
- Circulate materials well in advance so that partners can review them, and circulate summaries promptly after meetings.
- Finally, don't forget to celebrate successes. This is essential to building a team.

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Collaboration Worksheet

Develop a list of organizations, agencies or community leaders that share your mission or goals.

Write them down below:

Develop a list of organizations or agencies that may complement your program.

Write them down below:

Develop a list of organizations or agencies that have a stake in this issue.

Write them down below:

Things to consider when collaborating:

After you have developed a list of potential collaborators, consider such questions as:

- Do they have special skills, authority or knowledge to assist the collaboration?
- In what way would the collaborator benefit from the initiative?
- Is there a history of communication and cooperation with the collaborator?
- Does each collaborator have sufficient time, staffing, resources and/or funding to commit to collaborative activities?
- Do the collaborators reflect the diversity of the community and/or target population?
- Does each collaborator view health, wellness and/or substance abuse as part of their mission?

Finally, determine which organizations, agencies or leaders you will invite to collaborate on the initiative. You may also decide to invite additional collaborators at a later time.

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Although a wellness initiative may not require enormous resources, some investment will be necessary in order for it to be effective.

Funding Your Initiative

Your wellness initiative may require outside funding to get off the ground. Before you begin seeking outside funding for your initiative, there are a number of strategies to consider, including pooling or sharing funds with collaborators and reorganizing existing resources. It is a good idea to meet with your collaborators to determine what resources are currently available and take an inventory of resources that may already exist.



The Small Business Wellness Initiative utilized existing office space at each of the partners' primary locations to house initiative staff. In addition, the initiative utilized free conference space through local business assistance centers and other community organizations for community outreach efforts. A great example of pooling and using existing resources was identifying access to Employee Assistance Program (EAP) services. Through our partnership with the Small Business Development Center, the initiative was able to offer free EAP services to participating businesses for a limited time period.

One other thing to do before seeking outside funding for your initiative is to develop an itemized budget. Your budget should detail your investment by providing accurate and realistic information concerning the amount of money it will take to achieve your desired outcomes. Budget expenses may include, but are not limited to, the following:

- **Equipment:** this includes any equipment or tools used to implement your program. (i.e. projector, laptop, screen, printer)
- **Supplies:** these costs include any items needed for carrying out your initiative. (i.e. flipcharts, pens, folders, paper)
- **Training Costs:** this includes costs specifically associated with training delivery. (i.e. staff time, training manuals, travel expenses)
- **Marketing:** these costs cover all promotional and collateral materials used to promote your initiative. (i.e. brochures, incentives, printing)

While many different types of funding sources exist, they are not always easy to find. It is best to pursue multiple funding streams at once. Some funding sources that organizations may pursue include:

- **Grants:** funds provided either through government (city, county, state or federal) or through private foundations that often require an application, proposal and evaluation reports
- **Sponsorships:** funds that help pay for a program or initiative, in exchange for recognition as a sponsor on all promotional items
- **Gifts:** *in-kind* donations or other contributions solicited from corporations or organizations

When exploring funding sources for your initiative, it may be good to start with your local and state agencies. Nonprofit service centers may also be available to assist in finding possible funding sources.

The Small Business Wellness Initiative was funded by a grant from the Center on Substance Abuse Prevention (CSAP) through the Substance Abuse & Mental Health Services Administration (SAMHSA).

Grants.gov also allows organizations to electronically find and apply for competitive grant opportunities from all federal grant-making agencies. The web site also provides an overview on developing and writing a grant proposal. To begin searching for grants, visit www.grants.gov.

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Funding Worksheet

Develop an inventory of existing resources and/or funds available. List all resources below:

Develop an anticipated budget. List itemized expenses and project costs below:

Item/Activity	Projected Cost
<i>Example: Office Supplies-Flipcharts</i>	\$200

Develop a list of possible funding sources or agencies. Be sure to research various types of funding sources and find out what types of projects they fund.

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A plan is a roadmap for your activities that will facilitate systematic implementation of a program.

Mapping Your Plan

Although planning sometimes takes time away from program activities, it is important to have an ongoing planning document that specifies who will do what, when, where and how. Good planning can improve implementation of your initiative, which in turn, can lead to improved outcomes. Just like a “to do” list is used to organize tasks, your planning document can provide a straightforward method to implementing your initiative.



Your planning document can also help guide you into the right direction toward your goals and objectives. Reviewing your plan often can help you and your initiative to stay on track.

Your planning document can also include each partner’s roles and responsibilities. Once you have selected your collaborators and have taken an inventory of resources, it is important to sit down as a team and clearly define each partner’s roles and responsibilities and develop an organizational structure for your initiative. Structure your initiative in a manner that best fits your community needs.

Once your roles and responsibilities are established, it will be easier to view what things need to be done and by whom. A timeline of all program activities, including recruitment and outreach, should also be included in your plan. Develop a timeline that works best for your initiative and share it with each partner. Your timeline of activities should be as specific as possible and updated frequently. Your timeline and planning document should be reviewed at initiative meetings to determine whether the team is on track.

The Small Business Wellness Initiative team developed a strategic plan and utilized Microsoft Project software to develop timelines for the outreach, implementation and research process. We identified four foundational strategies that helped inform how we would approach the five primary goals.

Sample Timeline

Date	Activity/Action
April 2002	Host focus group retreat with local small business owners, members of local Chambers of Commerce and initiative staff members
April 2002	Develop marketing and recruitment materials; actively begin recruiting businesses through mailings, cold calling and events
June 2002	Begin field work with recruited businesses; conduct needs assessment
July 2002	Continue field work with participating businesses; begin training delivery

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Congratulations!

We hope that you have been successful in laying the foundation for your wellness initiative. By this point, you should have:

- **Outlined your goals and objectives**
- **Identified potential collaborators**
- **Found and secured funding sources**
- **Mapped your plan and timeline**

Once you have completed all of the above, it is time to put your plan into action. Hopefully, you have found that you are one step closer to fulfilling some of your initial goals and objectives.

Now, you are ready to move on to ***Marketing Well*** section that will address:

- **Defining your target**
- **Reaching small businesses**
- **Utilizing media messages**
- **Small business selling points**

The following section will assist you in reaching your target audience and recruiting businesses to participate in your initiative.
