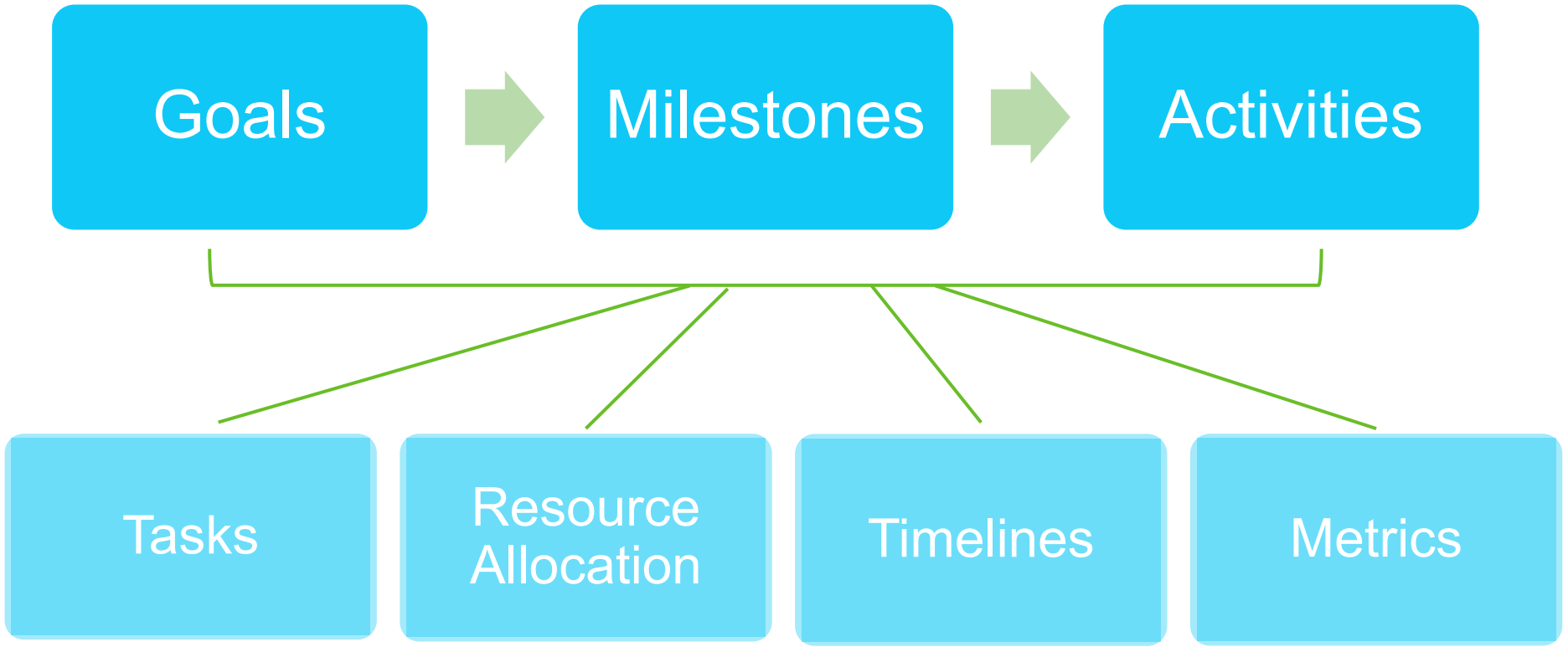
What type of planning will we focus on today? Implementation plans.



Goals vs. Milestones vs. Activities

Goal: Overarching outcome/impact you want to achieve (final destination).

Milestone: Measurable checkpoints toward your goal (stops along the way).

Activities: Tasks and actions to achieve your milestones and goal (roadmap).



Strategic Goals

- Foundation for the rest of your plan.
- Measurable objectives that indicate success toward your long-term overarching goal or mission.
- What is the outcome/impact you want to achieve?
- When creating strategic goals, they should be:
  - **Purpose-driven:** Aligned with your coalition's mission and vision.
  - **Actionable:** Steps taken to achieve your goals ("activities").
  - **Measurable:** How progress will be measured and the timeframe to reach your goal.

Developing Goals

Goals should…

- Contribute to coalition mission and vision
- Reflect CC&C partnership priorities and frameworks
- Factor in stakeholder input
- Be SMART, as much as possible.

S	M	A	R	T
Specific	Measurable	Attainable	Relevant	Time Based

Why Use SMART Goals?

SMART goals help create a roadmap to arrive at your destination:

- Where do you want to go? (What outcome/impact do you want to create?)
- How will you get there?



Baseline Data

- Leverage baseline data to design SMART goals that generate long-term progress
  - Where were you last year? How will you build on that this year?
  - Use coalition data from CART, or other sources, to generate your baseline.
- Example
  - Last year, you reported that nine fleet managers participated a coalition-hosted technical training on how to identify the most compatible vehicles for alternative fuels in their fleet.
  - **Potential new goal:** In 2027, host one fleet manager technical training with at least 20 fleet managers.
  - This goal considers the previous participation (nine) and increases the participation (20). The number of training events remains the same. Because the content is already developed, the coalition can invest more resources into promotion. With 96 fleet stakeholders in the coalition, this goal is ambitious but achievable.

Activity: SMART Goals

- **Time:** 5 minutes
- **Work:** Individual
- **Instructions:**
  - Identify one priority or goal that your coalition might be interested in pursuing out of those you drafted in yesterday afternoon's Framework for Success activity or CC&C Partnership-Level Goals activity.
    - *Hint:* Go to "Day 1" in the lefthand tab of your workbook and select "Planning for an Impactful Coalition: Part 2" to quickly find those activities and your responses.
  - Rewrite that priority/goal as a SMART goal.

Developing Milestones

- Each strategic goal needs an action plan.
- What interim checkpoints will help you track progress toward your goal? Identify smaller objectives/deliverables with planned completion dates.
- Factor in hard deadlines (e.g., funder deadlines), staff availability, changes in workload throughout the year, and dispersal of milestones so they don't interfere with one another.
- Find the sweet spot for level of detail. Don't plan to the task level at this stage. Outline the major, impactful accomplishments you will hit in your journey toward this goal.

Developing Milestones

Example goal: Identify opportunities to expand renewable diesel market in the region by the end of 2027.

Example milestones:

Milestone Description	Planned Completion Date
Hold one-on-one meetings with at least three renewable diesel producers and distributors to understand market.	Feb. 30, 2027
Administer questionnaire to all fleet stakeholders to gather broad insights.	March 30, 2027
Facilitate fleet renewable diesel roundtable with at least five fleets.	May 30, 2027
Complete summary report of market insights and opportunities.	July 30, 2027

Activity: Milestones

- **Time:** 10 minutes
- **Work:** Individual
- **Instructions:**
  - Use the provided table in your workbook to outline milestones for the SMART goal you wrote in your previous activity
  - **Step 1:** Start with the milestones themselves—no dates needed!
    - Focus on the main things you will accomplish toward that goal. How will you measure your progress? What will be your interim checkpoints?
    - Find the sweet spot for level of detail. Don't need to go too deep (every phone call) but don't stay too high-level either (one milestone is probably not enough).
  - **Step 2:** Add completion dates that are reasonable but will keep the project moving.

Developing Activities

- What steps will get you to each milestone?
- Outline specific tasks to reach those milestones.
- These activities are what you will **do** to accomplish the milestones.

Milestone Description	Planned Completion Date
Hold one-on-one meetings with at least three renewable diesel producers and distributors to understand market.	Feb. 30, 2027
Administer questionnaire to all fleet stakeholders to gather broad insights.	March 30, 2027
Facilitate fleet renewable diesel roundtable with at least five fleets.	May 30, 2027
Complete summary report of market insights and opportunities.	July 30, 2027

Developing Activities

- Contact coalition directors in the region to ask for local RD industry contacts
- Send introductory emails to RD industry reps and secure meetings
- Hold meetings with industry reps
- Contact 15 fleets to secure participants for fleet renewable diesel roundtable
- Confirm five fleets to participate in roundtable
- Develop RD questionnaire for fleets
- Send RD questionnaire out to full fleet contact list
- Review questionnaire results and use them to inform roundtable agenda and content
- Develop agenda and content for fleet roundtable
- Draft summary market report, including insights from industry meetings, questionnaire results, and roundtable insights. Share with participants and request feedback.
- Complete summary market report incorporating feedback

Activity: Activities

- **Time:** 10 minutes
- **Work:** Individual
- **Instructions:**
  - Create a list of activities that would help you reach the milestones you drafted in the previous activity
    - Some activities could serve multiple milestones
    - Others might be tailored to specific milestones

Pulling it Together

- Repeat this process for your priority coalition goals.
- Look at your complete set of goals, milestones, and activities through the lens of capacity, time, and other resources.
  - Is it ambitious but reasonable to accomplish all of them?
  - If so, great! If not, recalibrate.
- Refine or add complexity to your planning process over time.

Planning Next Steps

- Assign resources (e.g., staff, funds) to different activities or projects in your plan.
- Use your plan to develop project management tools to align the team on milestones, timelines, responsibilities, and resources.
- Come back to your plan and revise as necessary throughout implementation.
- Establish regular cadence for additional stakeholder engagement and planning revisions.
- Refine or add complexity to your planning process over time.



Discussion

- Which component was most challenging for you (goals, milestones, or activities)? Why?
- How can this stepwise planning process help your coalition?
- How will you ensure you devote enough time to planning?
- What questions do you have?