

## Preparing for the New Year!

As the new year approaches, it's the perfect time for SHIP counselors to reflect, and prepare for another impactful year of Medicare outreach and assistance. With a bit of planning now, the upcoming months can be more organized, efficient, and energizing – benefiting both you and the community members you serve.

Here are a few ways to prepare for the new year and set yourself up for success, along with simple tools to help you track outreach and stay on top of your goals.

### Reflect On the Past Year

Before moving forward, take a moment to look back on the past year. Look at areas of your outreach that went well and what can be improved. Which events had the biggest turnout? What partnerships were most effective? Were there barriers that affected participation? These reflections can help with your outreach strategy for the year ahead.

### Review of Medicare Updates and Resources

Each year brings updates to Medicare, outreach strategies, and educational materials. Make time to review new policies, program changes, and SHIP resources. Organize your digital folders or physical binders so you can easily access updated handouts, presentation, and talking points.

### Set Outreach Goals

Think about what you would like to accomplish in the new year, this might include:

- Increasing the number of outreach events you participate in
- Reaching new or underserved communities
- Strengthening partnerships with community organizations
- Offering more educational presentations or workshops
- Increase digital outreach

Setting goals will help you stay focused and motivated throughout the year.

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## Find A Tracking System That Works for You

Tracking your outreach is one of the most powerful tools for staying organized and showing your impact. There is no one-size-fits-all method, what matters most is choosing a system that works best for you. Here are a few options to consider:

- **Digital Calendars**

Using tools like Google Calendar or Outlook allows you to schedule events, set reminders, and color-code different types of activities (outreach events, counseling days, trainings, etc.). Many counselors appreciate the ability to access their calendar from both their computer and phone.

- **Paper Planners or Wall Calendars**

If you prefer something tangible, a paper planner or wall calendar can be just as effective. Writing down events helps some people better remember their commitments, and it's easy to view your entire month at one glance.

- **Outreach Logs or Spreadsheets**

A simple outreach log-either on paper or in Excel/Google Sheets-can help you track:

- Date and location of outreach
- Types of events (presentation, health fair, one-on-one counseling, etc.)
- Estimated attendance
- Key topics discussed
- Follow-up needs

This information is helpful for reporting, planning future outreach, and identifying trends.

- **Notebook or Binder System**

Some counselors prefer a dedicated outreach notebook or binder with tabbed sections for each month. This can include calendars, event notes, contact lists, and copies of handout used.

## Block Time for Planning and Follow-Up

Outreach doesn't just happen at events. Be sure to schedule time for; preparing materials, coordinating with partners, entering data and tracking outcomes and following up with individuals or organizations.

## Start the Year with Intention

Preparing now helps ensure that when outreach opportunities come up, you feel ready, organized, and confident.

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Here's to a new year filled with meaningful connections, successful outreach, and continued dedication to Medicare education and support!

For outreach material visit the [GWAAR Medicare Outreach and Assistance Resources](#) webpage.

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