

"CHEAT SHEET" ON STRATEGIC PLANNING¹

What is Strategic Planning?

A management tool which helps an organization "do a better job, focus its energy, to ensure organizational members are working toward the same goals, and to assess and adjust direction in response to a changing environment." This ability to adjust and be responsive over time is critical to the thinking behind, and development of, a strategic plan. It is supposed to be a living, dynamic document.

Successful Strategic Planning²:

- leads to action
- builds a shared vision that is values-based
- is an inclusive, participatory process in which participants staff take on a shared ownership
- accepts accountability to the community
- is externally focused and sensitive to the environment
- is based on quality data³
- requires an openness to questioning status quo
- is a key part of effective management

Our Strategic Plan Will Include (among other things):

1. Vision Statement – Ours is "*Jefferson County: A thriving community for aging well.*" This statement expresses our envisioned future. Vision statements are "design-oriented."
2. Mission Statement – Ours is "*To develop and implement strategies creating inclusive, livable communities through sustained partnerships and integrated services.*" This statement specifies the purpose of our project. Mission statements are "execution oriented" and they support the overarching vision.

Planning done by governments is most often intended to benefit the whole community. Cross-agency cooperation is critical in order for successful plan development and implementation.

¹ Adapted from the following sources of information: Strategic Planning for Dummies, Wiley Publishing (2007), Alliance for Nonprofit Management website, Good to Great and the Social Sectors, written & pub. by Jim Collins (2005), Winning Grants; Step-by-Step, Carlson & O'Neal-McElrath, Jossey-Bass, 2008.

² Adopted by Support Centers of America

³ Main thing is to assemble evidence – quantitative and/or qualitative – rigorously (Collins 2005).

3. Findings from Assessment – During Year One of the Aging Well Project, we assessed past and future trends, strengths, and gaps related specifically to Jefferson County. Priorities were identified by each of the workgroups. Some priorities were applicable to all of the workgroups. In Year Two we'll assess innovative models and where we want to focus our attention in the short- and long-term to create livable communities for aging well.
4. Goals – A goal is a focus of accomplishment supported by a series of objectives to realize it. Goals are desired outcomes and are set intentionally. The goals are considered part of the action plan, along with objectives, action steps, completion dates, potential partners, and responsible parties. Each workgroup will identify 3 to 5 short-term (years 1 through 5) goals and 3 to 5 long-term (years 6 through 20).
5. Objectives – An objective is a significant step toward a goal; or a precise, measurable, time-phased result. An objective can either be an “outcome” objective which demonstrates an impact or result – or – a “process” objective which focuses on a process to achieve an objective.

***Now our work must involve turning the "PRIORITIES" we identified
into goals, objectives and action steps.***

In developing and when done writing the strategic plan for aging well in Jeffco, we should have answers to the following:

- 1. Does the plan connect the mission to the vision?***
- 2. Is the plan realistic?***
- 3. Is the plan integrated?***
- 4. Is the plan balanced? (covers various aspects of our area of concern – aging)***
- 5. Is the plan complete – any holes or missing pieces that stand out?***
- 6. Is the document clear?***