



# Strategic Planning & Strategic Programs for --- Coalitions

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# Our Working Definition of Coalition...

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A coalition is an alliance representing different sectors and/or perspectives on a common issue.

Formed around a **common interest** or problem for the purpose of **uniting resources** to be used towards a **common goal**.



# Essentials to Coalition Success

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- Clear common mission and goal(s)
- Diverse strengths, talents, expertise, perspectives
- Dedicated membership
- Shared responsibility and accountability
- **PROGRESS**

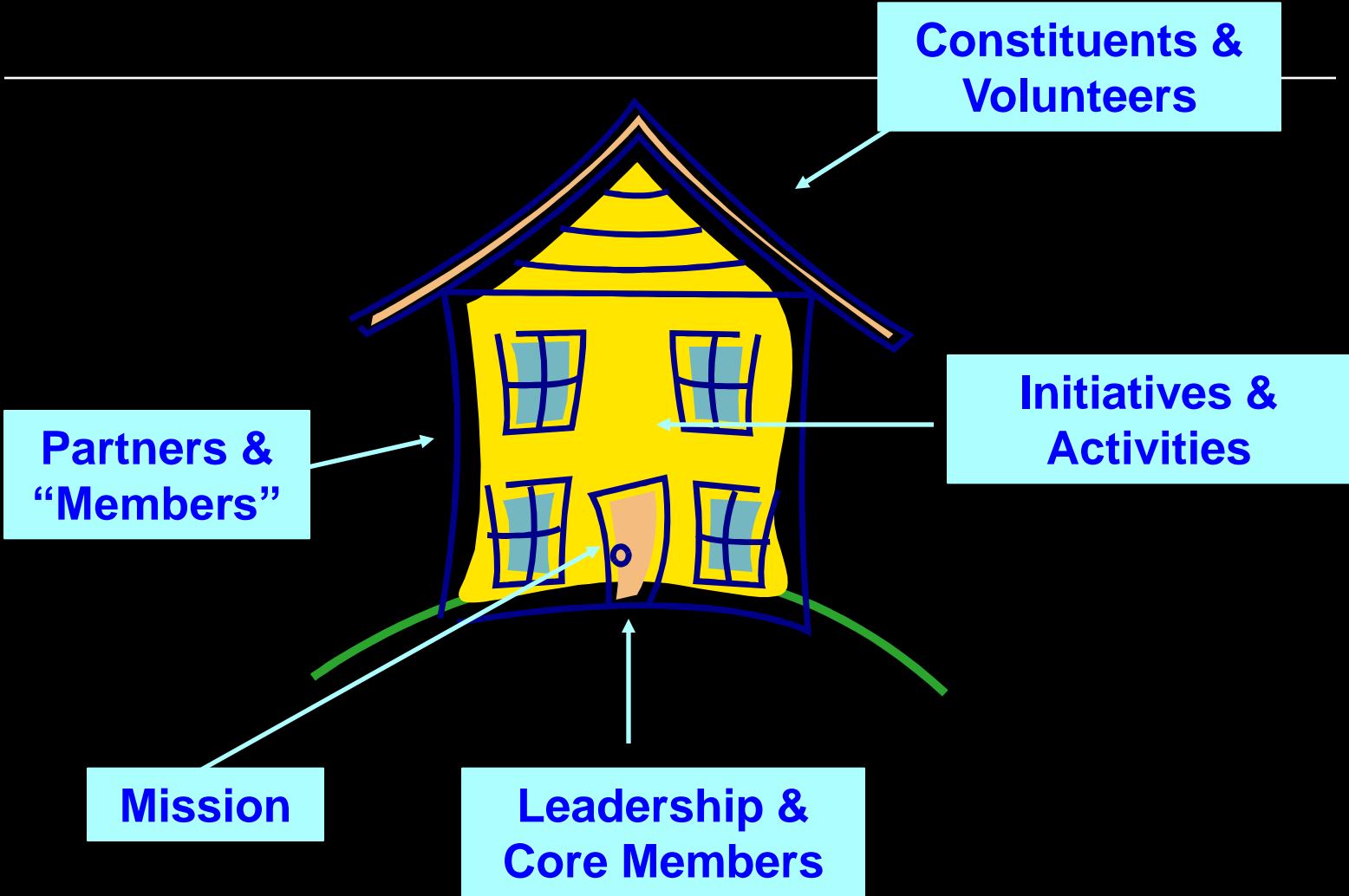


# Strengthening Coalitions

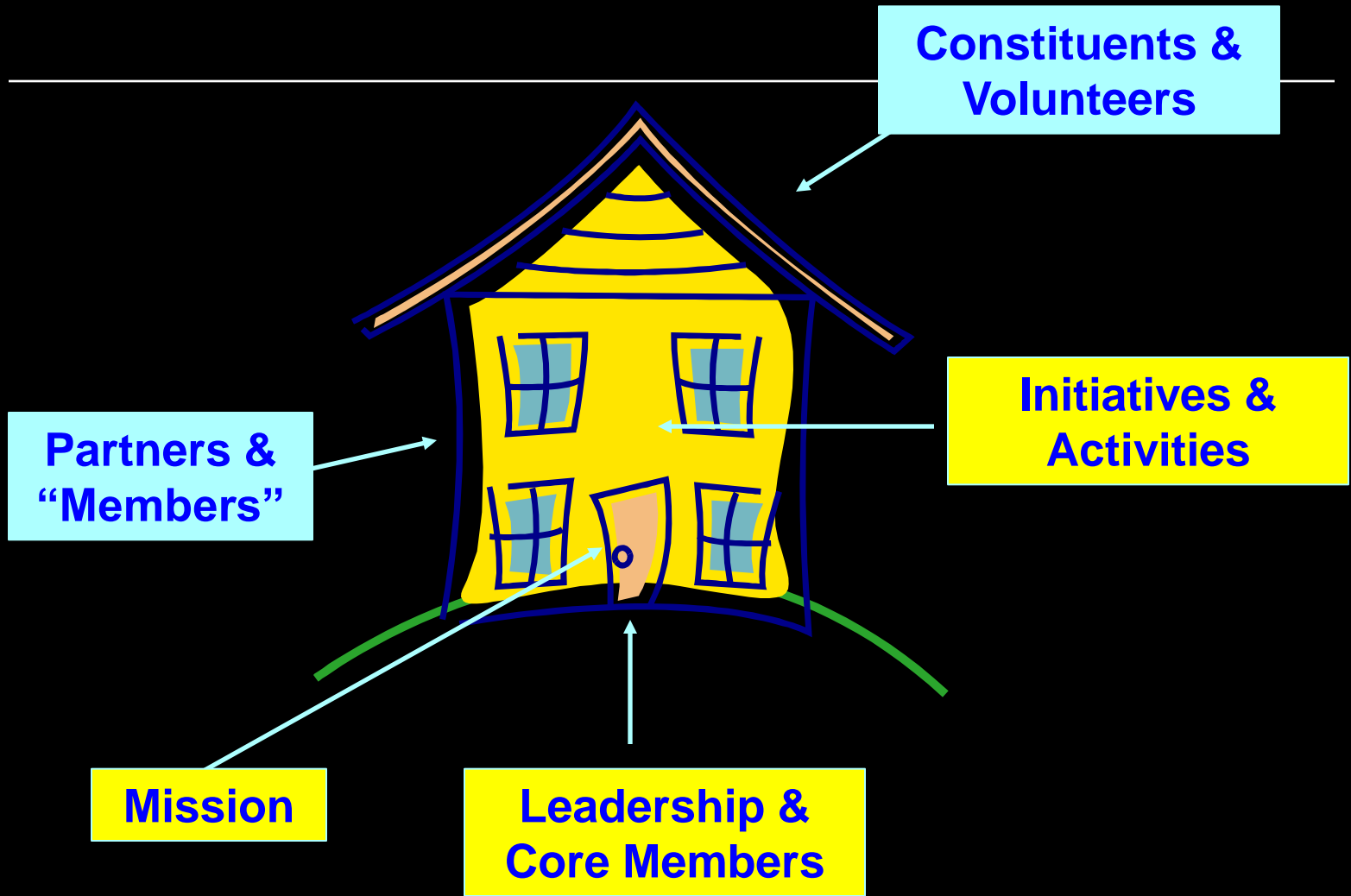
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- Paid Staff
- Diverse Membership
- Collaboration local and state government agencies
- Regular Meetings
- Annual Initiatives
- Recognition
- **Planning, Evaluation, and Feedback**

# Coalitions are Like Houses...



# When Do Coalitions Thrive?





# Killer “Cs” of Coalitions

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- Conflict
- Cliques
- Competing priorities
- Competing agendas
- Concentration of work
- Criticism
- Cash / Lack of funding



# Keys to Coalition Success

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- Sustainability
- Independence
- Planning and Focus





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# **Strategic Planning**



# What is Strategic Planning?

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A systematic process that brings consensus regarding priorities among the organization's leadership.

**Source: The Complete Guide to Nonprofit Management**



# What is a Strategic Plan, Really?

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A plan that describes where the organization is going and how it will get there.



# Why Create a Strategic Plan?

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- Provide focus and clarity
- Convey mission to all levels of personnel
- Create performance measures
- Create a blueprint for success
- Build consensus
- Reenergize members



# Elements of a Strategic Plan

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- Mission Statement
- Vision Statement
- Goals
- Objectives
- Strategies



# Developing a Strategic Plan

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- Consultant
- Coalition member or partner with expertise
- Do-It-Yourself



# Strategic Planning-Pt. I

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- Constituent Building – Part I
- Internal Evaluation
- Environmental Assessment
- Plan Development
- Constituent Building – Part II
- Implementation
- Evaluation



# SWOT Analysis

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Assessment of internal and external factors that impact organization's potential for success.

Strengths & Weaknesses (SW) –  
internal

Opportunities & Threats (OT) -  
external





# Examples of Strengths

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- Strong understanding of population
- Collaboration between agencies
- Large Budget
- Clinical expertise

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# Examples of Weaknesses

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- Behind in technology
- Large number of staff vacancies
- Untapped creativity
- “Nearsighted” – not thinking “outside the box”



# Examples of Opportunities

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- Partner with outside agencies
- Pursue more RFPs
- Take lead on emerging public health issues



# SWOT Analysis - Threats

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- Increased chronic illness
- Change in health/public health environment
- Reductions in grant/program funding



# Key Results Areas (KRAs)

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Areas in which the organization must achieve success to grow and prosper.



# Examples of Key Results Areas

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- Increase visibility
- Strengthen clinical and support staff
- Increase partnerships
- Increase employee development



# A Mission Statement Should...

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- State organization's purpose and/or the needs addressed
- State core business of the organization
- State organization's principles and beliefs



# Sample Mission Statement

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**To promote health and prevent disease through education, advocacy, linkage to resources, and treatment thereby improving the quality of life for County residents.**





# Goals Defined

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- Outcome statement
- Define what organization desires to accomplish programmatically
- Reflect major action(s) of an organization



# Example of Goals

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1. By 2010, increase immunization rates and reduce preventable infectious diseases.
2. By 2010, prevent HIV infection and its related illness and deaths.
3. By 2010, promote respiratory health through better prevention, detection, treatment, and education efforts.



# Objectives Defined

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- Precise
- Time-based
- Measurable
- Related to goal(s)
- Begin with action verb
- Specify a date for accomplishment

**All necessary for evaluation later!!!**



# Examples of Objectives

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By 2010,

- 1.1 Reduce by 10% new cases of pertussis.
- 1.2 Reduce by 15% the number of new HIV cases among adults and adolescents.
- 1.3 Reduce asthma deaths by 20%.



# Drafting Goals and Objectives

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Review Key Results Areas (KRAs) and build around them.



# Drafting Strategies

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Describe how you will accomplish objectives:

- Action-oriented
- Do not have to be measurable
- Specific
- Detail “players” and activities

[Organization's Name]  
**Strategic Planning Matrix**  
 20XX to 20XX

<b>Goal #1</b> <i>Write your first goal here.</i>				
<b>Objectives</b>	<b>Strategies</b>	<b>Responsibility / Action</b>	<b>Due Date</b>	<b>Performance Measure</b>
<b>Objective 1.1</b>  <i>Write your first objective here</i>	1.1.1 First strategy here			
<b>Objective 1.2</b>	1.2.1 Second strategy			
<b>Objective 1.3</b>	1.3.1			



Recruit & Reenergize  
Membership Through:

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Open Space  
Technology





# Open Space Technology

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- Form of conferencing that considers:
  - Human desire for socializing and networking
  - West African village norms and Native American traditions
- “Chaotic, productive, and fun”
- Can be tailored to most settings
- An inexpensive alternative to a Strategic Planning Retreat



# How OST Works

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- “Passionate people” announce passion, meeting time, and location
- Participants choose meeting
- Meeting participants discuss and identify priorities
- Participants accept responsibility for implementing “passionate priorities”



# Key OST Principles

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1. Everyone who comes must be passionate about *something*.
2. Whoever comes is in the right place.
3. Whatever happens is the only thing that could have.
4. Whenever it starts is the right time.
5. When it is over, it is over.



# Key OST Principles (cont.)

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Law of Two Feet:

*If you find yourself in a situation where you aren't learning or contributing, go somewhere else"*



# OST Application to Coalitions

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- Resulting “passion groups” become subcommittees
- Coalition selects priorities
- Subcommittees create goals and objectives for activities and initiatives
- Subcommittees report on ideas
- Leadership monitors progress



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Let's Try It



# Strategic Programs

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# What is a Program?

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A collection of organizational resources that is geared to accomplish a certain major goal or set of objectives.

<sup>1</sup> Carter McNamara, MBA, PhD,



# Why Have Programs in Coalitions?

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- Provide direction and perspective
- Create or strengthen structure
- Garner “buy-in”
- Create vehicle for cohesion
- Solicit partners and funding
- Mechanism to measure effectiveness of efforts



# Cornerstones of Program Planning

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- Ties into mission
- Ties into strategic plan
- Involves appropriate internal and external parties
- Uses team approach



# Programs are Systems

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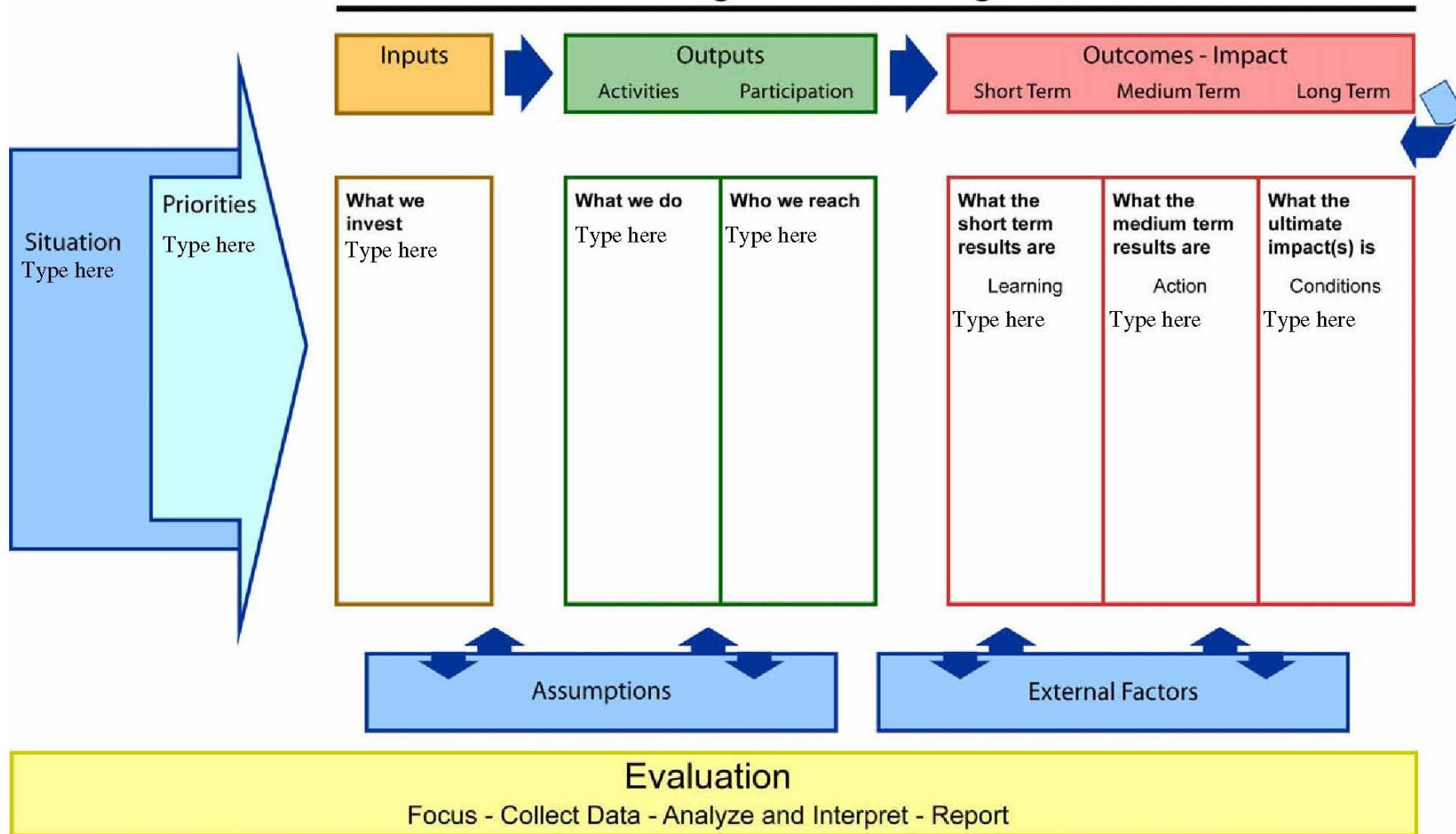
- Inputs
- Processes
- Outputs
- Outcomes
- Feedback

# "You Get Out What You Put In"

## PROGRAM DEVELOPMENT

Planning – Implementation – Evaluation

### Program Action - Logic Model





# What is a Logic Model?

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Focuses attention on HOW the program will achieve the desired outcome(s) and WHY specific strategies were selected.

**Logic drives activities.**



# Inputs

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The resources needed to run the program

- Money
- Facilities
- Consumers / Patients
- Employees

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# Process

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How the program's activities  
will be completed



# Outputs

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Tangibles; What actually is produced:

- Number of people served
- Number of items produced





# Outcomes

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**Impact** on the consumer / patient, eg.:

- Improved health
- Increased immunization rates
- Enhanced work safety

# Getting There

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**Who?**

**Where?**

**What?**

**Why?**

**When?**

**How?**

# Why?

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- Why do we want to create a program?
- What are the goals and objectives?

# What?

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- What are we going to do?
  - What are the program features?

# How?

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- How are we going to implement the program?
  - What are the strategies and activities?
  - How will we fund it?

# Who?

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- Who is going to do the work?
  - Planning?
  - Funding?
  - Implementation?
  - Evaluation?



# When?

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- When will we start and end the program?
  - Is it seasonal, annual, ongoing?

# Where?

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Where will the program be implemented?

- In what setting?
- Using what vehicle?
- In how many settings?





# Program Planning Considerations

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- Goal(s)
- Objectives
- Strategies
- Evaluation
  - Data collection
  - Evaluation process
  - Reporting
  - Action
- Resources/Budget



# Project Evaluation

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- Should be considered during program development
- Employed at various stages of program implementation
- Types of evaluation
  - Formative
  - Process
  - Outcome



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Let's Try It

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## *Contact*

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