

Strategies for Region-Based Strategic Planning

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Housekeeping

- **Interactive session:** Be prepared to move around during this session –activities planned
- Questions during the session? **Put them in the parking lot!**
- **As an individual:**
 - Post-it notes
 - A working pen/pencil
- **As a table:**
 - Big sticky note
- **In the room-** big sticky notes with topics/titles note



Icebreaker [3 mins]

- On your post it notes, please write & then place on this larger sticky pad here:
 1. One thing you are hoping to learn from this session?
 2. On a scale to 1-10 how familiar are you with strategic planning processes?
 3. What was the worst movie you can recall that you saw?
- Notes can have your name or not – I will read out a few of these Post-it notes
- Will give me an idea if expectations for this session fit what I have planned and give you some foreshadowing
- Will help inform future sessions

Overview of Today's Conversation



Who is presenting?



What is strategic planning?

High-Level Overview [steps 1-5]



**Where do you start
and who do you
engage?**



**How do you prepare
for strategic planning?**

Who is presenting?

- PhD in Science Communication & MPH in Family & Community Health
- From the Pocono mountains to the plains of Indiana
- Grew up on Section 8/HCV
- Policy Analyst at INCAP
- Worst movie I can recall...Atlas on Netflix



What is strategic planning?

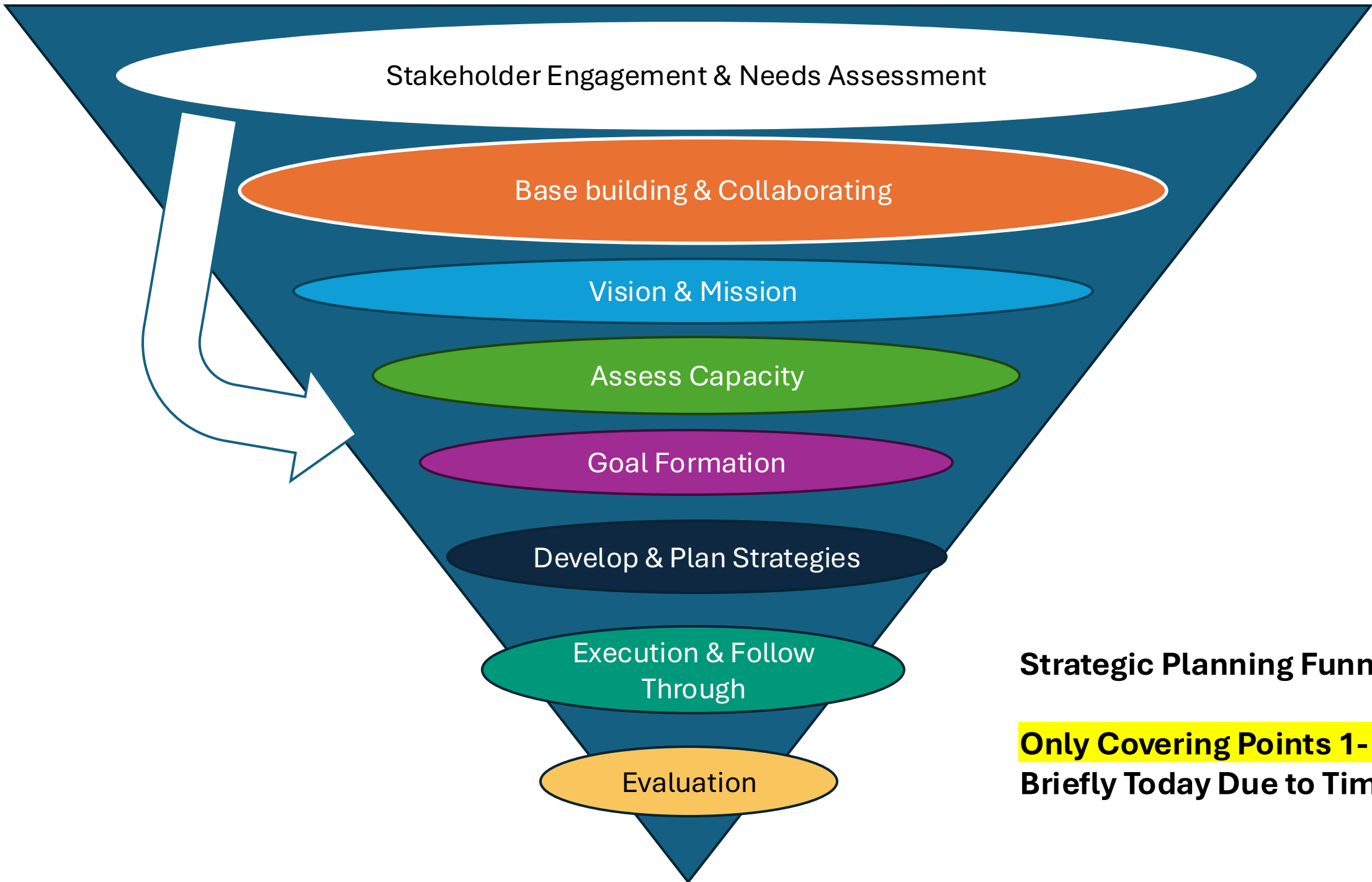
Strategic Planning:



ENGAGES YOUR
STAKEHOLDERS IN PLANNING
AND VISIONING DIRECTION ON
A TOPIC



FUTURE MAKING AND
PLANNING FOR YOUR
GROUP



Strategic Planning Funnel

**Only Covering Points 1-5
Briefly Today Due to Time**

Strategic Planning Will NOT:

DO THE
WORK



BE DONE
WITHIN ONE
MEETING



IMPLEMENT
& DO
EVALUATION

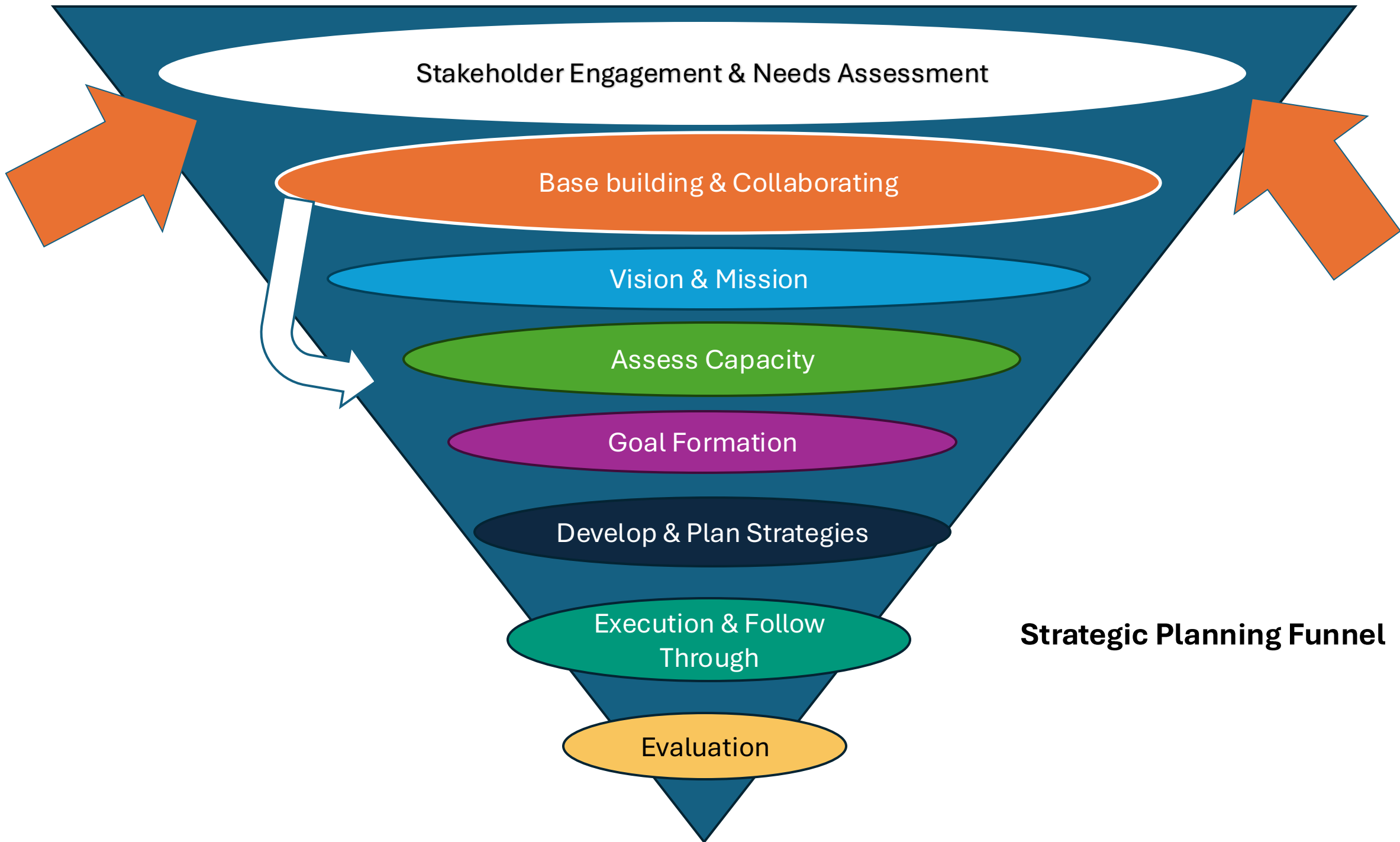
Strategic Planning Uses :

- Internal operational functionality
- Community/ Cross-Organizational Engagement
- Can be topic-specific reasons or issues/concerns
 - Ex:
 - Homelessness
 - Housing Instability
 - Affordability Needs for Housing

Why Do This?

- Builds Collaboration & Community Buy-In
- Creates Communication Point for Feedback on Concern/Topic
- Gives Reasoning for Approach Taken
 - Supportive in grant writing efforts
- Improves Direction –North Star

Where Do You Start /Who Do You Engage?



Stakeholder Engagement & Needs Assessment

Base building & Collaborating

Vision & Mission

Assess Capacity

Goal Formation

Develop & Plan Strategies

Execution & Follow Through

Evaluation

Strategic Planning Funnel

Think Point #1

[3mins]

- Think of your issue
 - Is the issue/concern/problem/desired change in that area?
 - Homelessness
 - Housing Instability
 - Affordability
- Think of your where:
 - Is there a certain location you would focus on?
 - Regional issue
 - County issue
 - Internal Organizational concern, etc.
- Write this down on your sticky note
- Place on the larger sticky note
- If you start to see patterns pull the sticky notes into clusters!

1. Start at the Ground!

Stakeholder Engagement & Needs Assessment

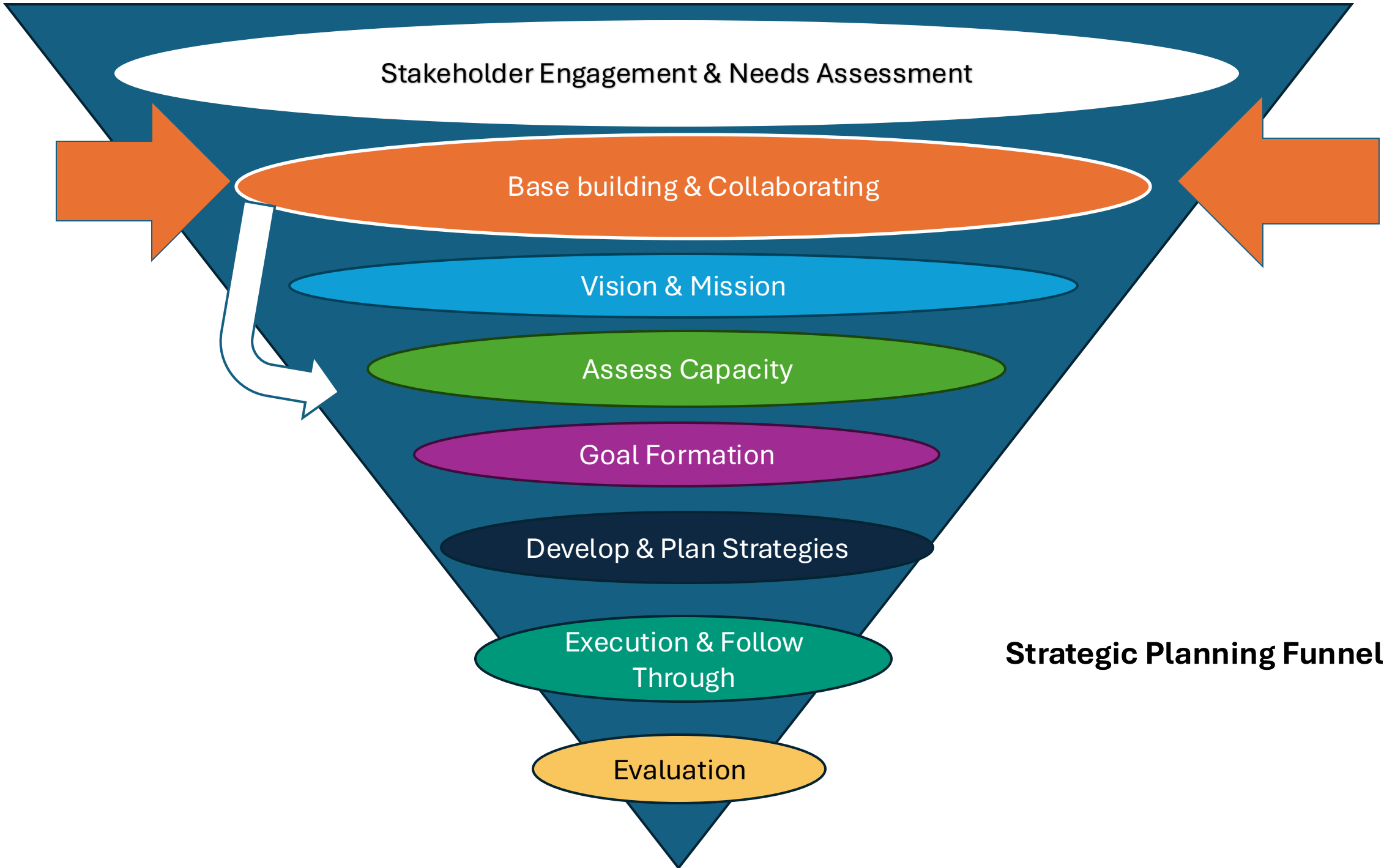


- Varied stakeholder perspectives
 - Impacted populations/community
 - Power players/brokers/influential community members
 - Active community members in the area
 - Organizations and groups engaged in efforts on your topic/concern

Think Point #2

[3 mins]

- Think of your who- Who would you want to engage in your strategic planning process and keep in mind:
 - Who are decision makers/power brokers/influential people in your area of work/region?
 - What community/group or population is impacted?
 - Who supports these efforts currently?
- Write this down on your sticky notes can use multiple
- Place on the larger sticky note
- If you start to see patterns pull the sticky notes into clusters!



Stakeholder Engagement & Needs Assessment

Base building & Collaborating

Vision & Mission

Assess Capacity

Goal Formation

Develop & Plan Strategies

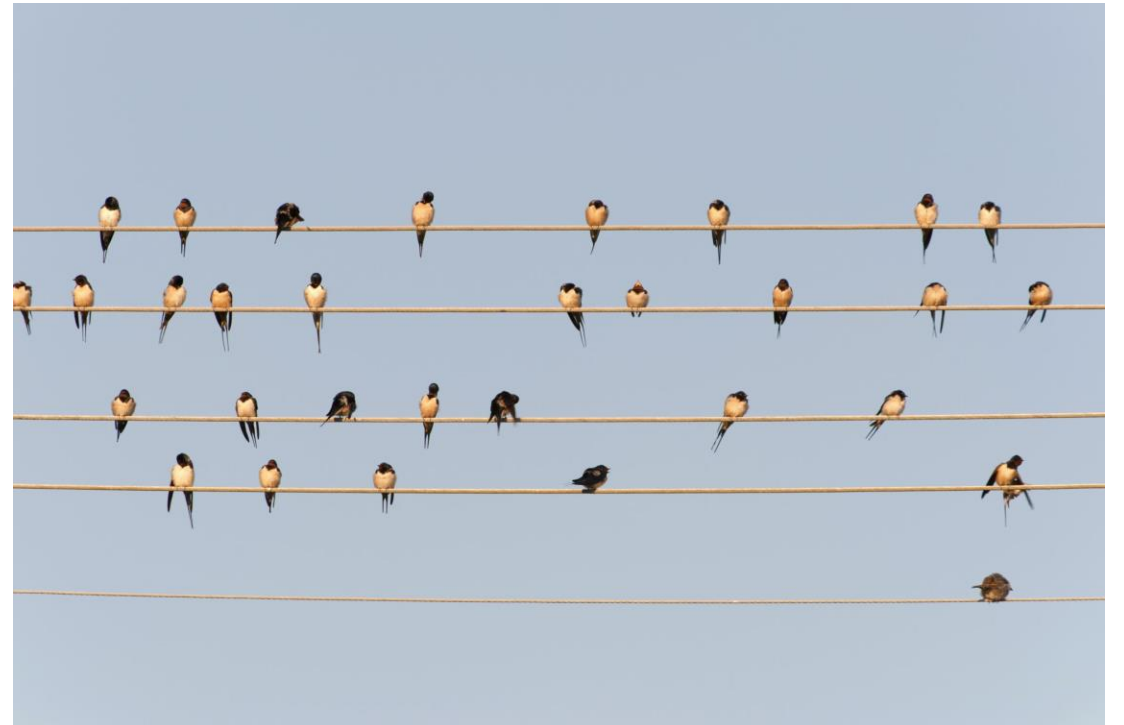
Execution & Follow Through

Evaluation

Strategic Planning Funnel

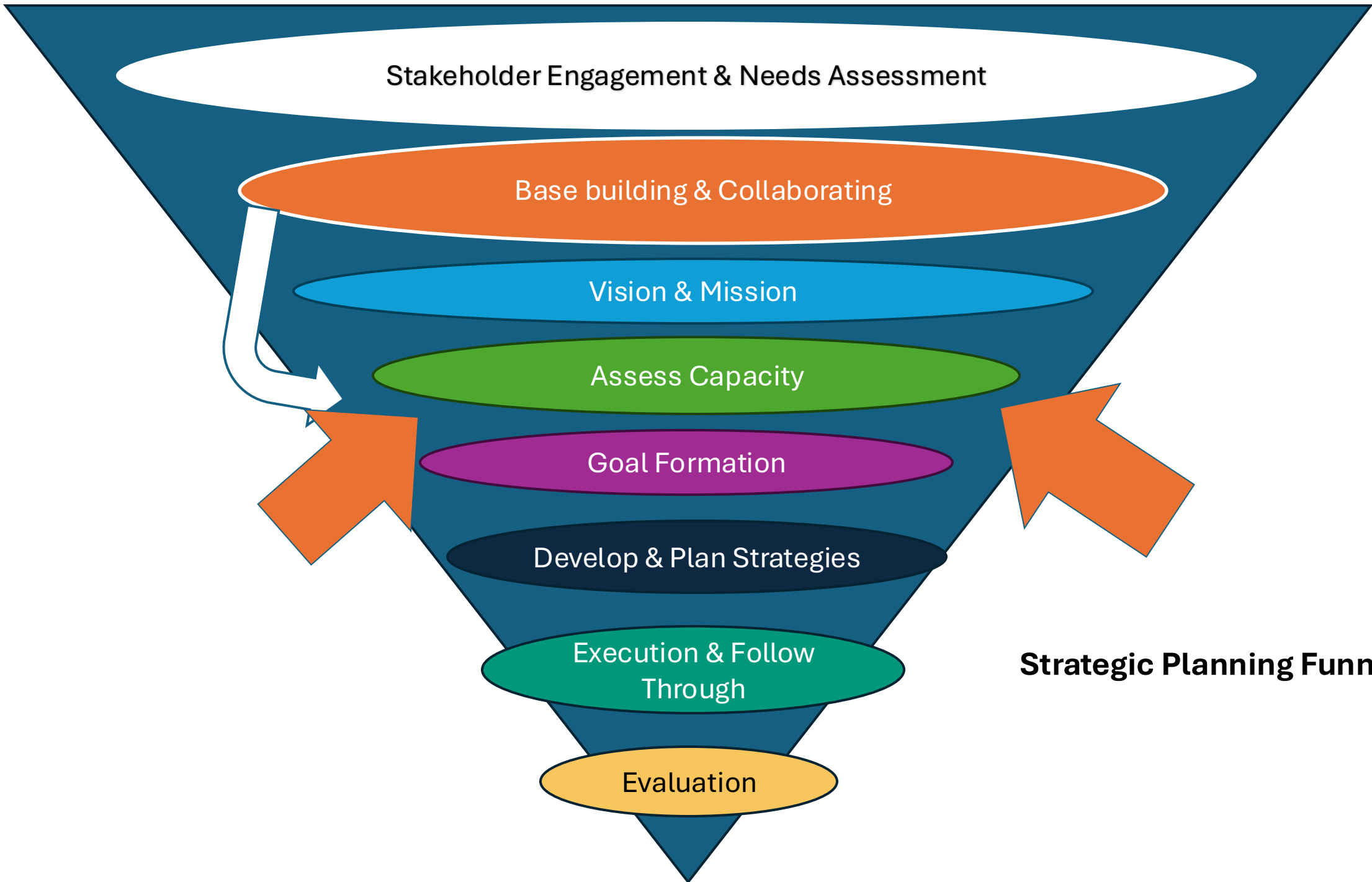
2. Base building & Collaborating

- Who is your base?
- Are there organizations you typically engage with or work in this space?
- Who should be engaged in these conversations?
- Who holds the ability to make or influence change?
- Who is impacted?



3. Vision & Mission

- **Vision:** What is your ideal outcome in a perfect world for your issue/concern/problem?
 - North Star
 - Example:
 - *All Region 9 residents will have access to safe, stable, quality, and affordable homes and community connections that allow them to be self-sufficient and active citizens.*
- **Mission:** How would you get to that goal?
 - Guiding pathway
 - Example:
 - *The Region 9 Planning Council (Wayne, Rush, Union, Fayette, and Franklin) will work collaboratively to build the capacity of partners to improve access to quality housing and provide person-centered, need-based interventions to households that are currently experiencing or at risk of homelessness.*



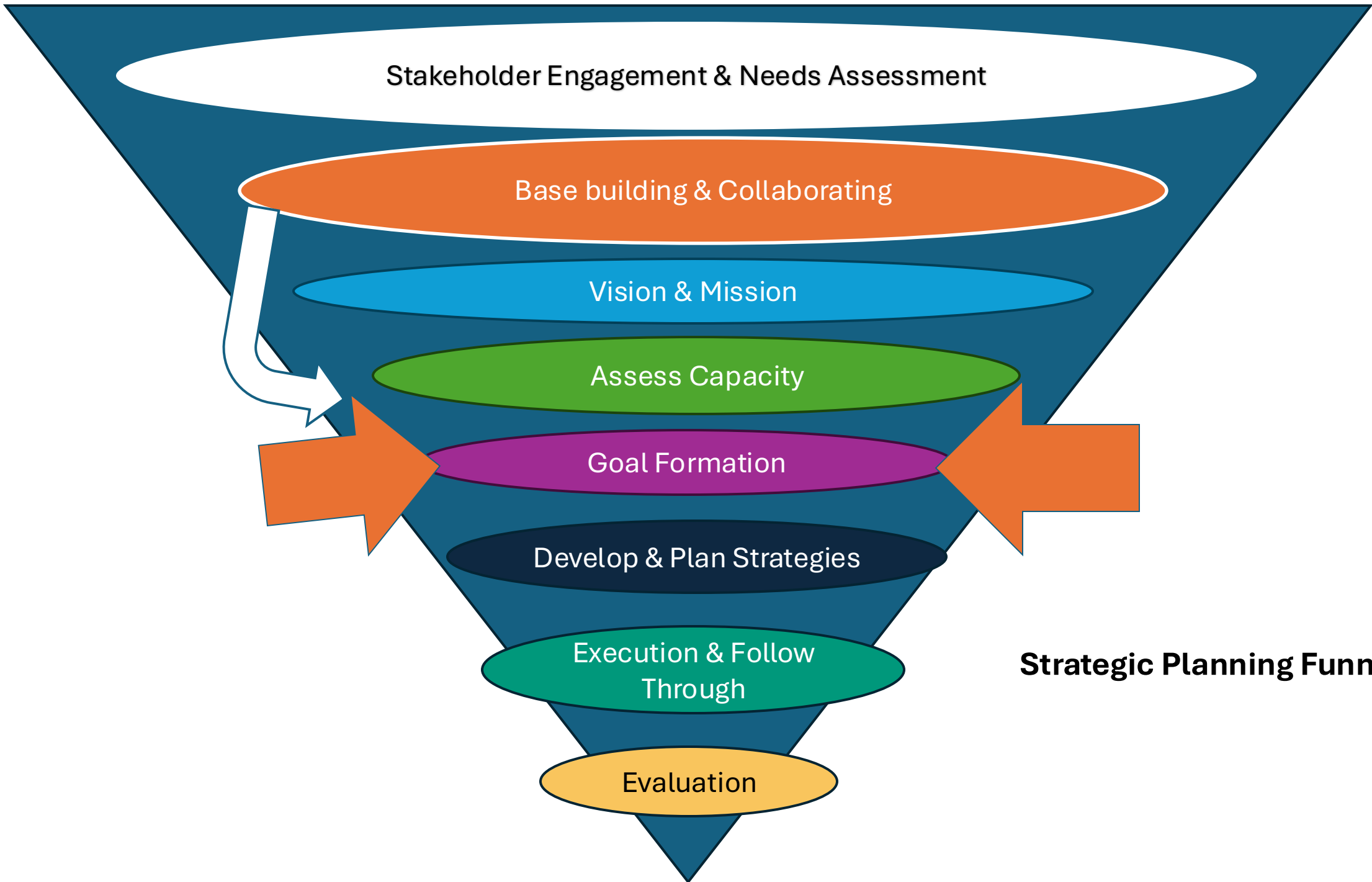
4. Assess Capacity



Does the group have skills that could help the mission and vision?



Are those engaged already at capacity?



Stakeholder Engagement & Needs Assessment

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5. Goal Formation

- Review your mission and vision
 - What large buckets can be made to reach that north star and stay on your guiding pathway?
 - Examples:
 - Efforts to End Homelessness are Well-Coordinated & Resourced
 - Homelessness is Acknowledged, Safe, and Short-Term
- Keep in mind:
 - Boundaries Around Goals
 - What is your rationale?
 - Think About Desired Outcome
 - What is the timeline for completion?

Case Example of INCAP Strategic Planning Work with the R9PC



Scan for a copy of the full public R9PC Strategic Planning Report

Celebrate your wins!



Region 9 Strategic Plan:
Toward Safe, Stable, Affordable Housing & Community Connections for All

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How Do You Prepare for Strategic Planning?

How do we do Strategic Planning- Let's Plan to Plan!

- Logic Model:
 - Typically used in program planning but is useful when doing preparation for any effort

1. Problem Statement: - What is the problem? Who is most affected?

Lack of affordable housing in XYZ region leading to increased number of homeless low-income families

2. Objective: (What do you aim to do to address your problem?)

Create a regional planning council strategic plan to address XYZ (Problem)

Inputs	Activities	Outputs	Outcomes(S/M/L)
Time + Expertise : Homeless Social Service Providers	<ul style="list-style-type: none">Engage in the planning processCommunicate and collaborate with other orgs. As to how current intake functions.Raise awareness of the benefits of engaging with the planning council for other providers	<ul style="list-style-type: none">Participate on a sub-committee or leadership on RPCContribute to building out service pathway communications between other providers/organizationsCreate awareness-raising materials for other providers to encourage engagement with the planning council	<p>S: Increased communication among service providers in the region</p> <p>M: Improved cross-group collaboration between regional homeless social service providers</p> <p>L: Streamlined process and communication that provides a clear pathway for clients in need across the region</p>

Assumptions: (What do you think you know?)

- Capacity to dedicate X hours of staff time a month to these efforts
- There is currently no strategic plan for XYZ

External Factors: (What is the environment?)

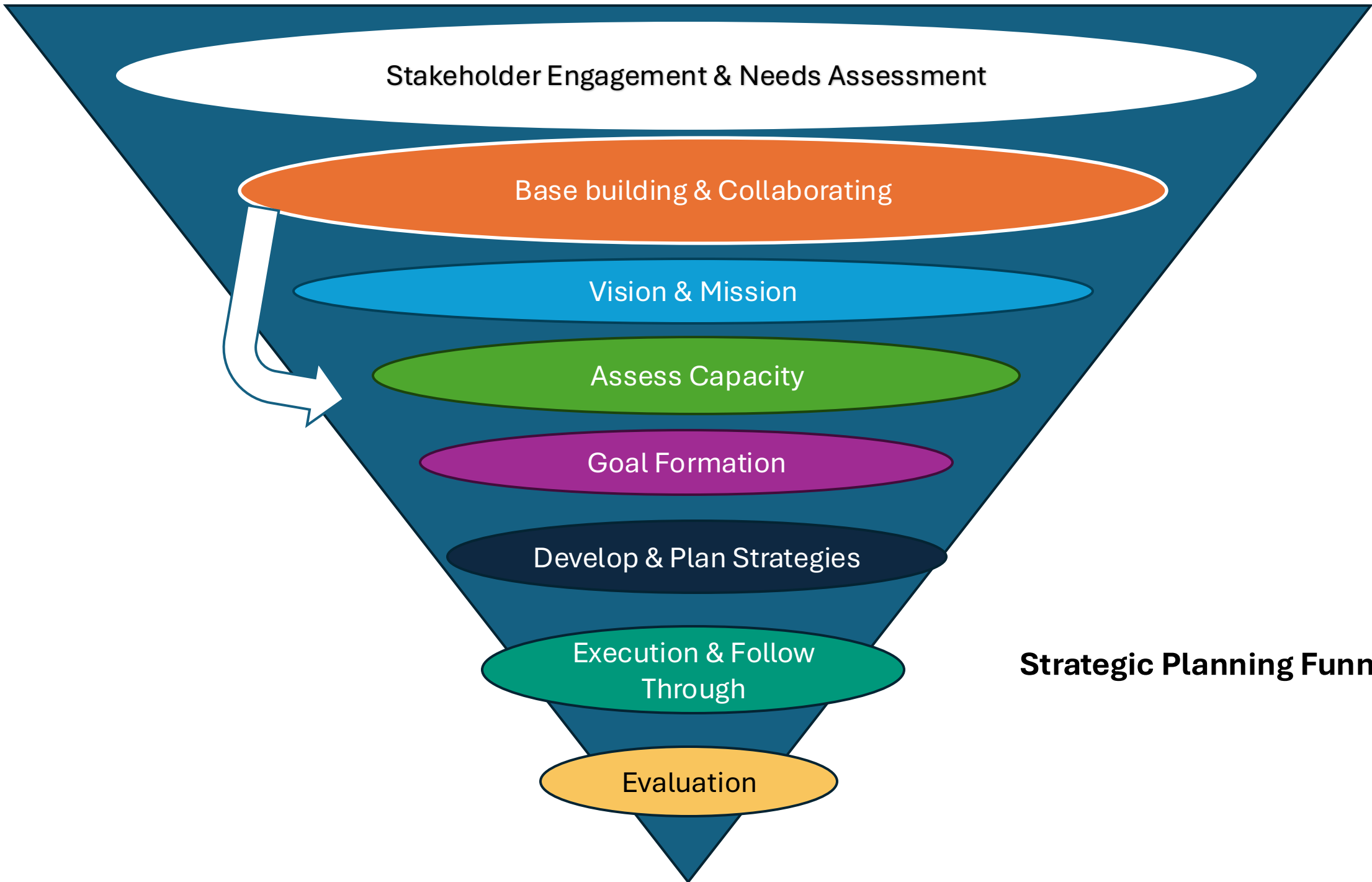
- There is community support to address the X problem
- Organizations are committed to collaboration
- Power brokers are supportive

Think Point #3

[10 Mins]

- Get into your regions!
 - Calling out by number to see if we can cluster you
- Use the large sticky note pad on your table and the post-notes to fill in your large logic model
- Look back at the previous post it notes on the walls if needing inspiration.
 - These should help guide you through your logic model

Additional Strategies/Tools & What Support INCAP Provides for Strategic Planning



Stakeholder Engagement & Needs Assessment

Base building & Collaborating

Vision & Mission

Assess Capacity

Goal Formation

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Through

Evaluation

Strategic Planning Funnel

Useful Additional Strategies/Activities



**STRATEGIC
BRAINSTORMING**



**ACTION PLAN &
OUTPUTS**



**TRACKING &
EVALUATION**

Useful Additional Tools /Activities

Carroll County SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis: COVID-19 Response April 2020

INTERNAL FACTORS			INTERNAL FACTORS		
STRENGTHS (+)		IMPORTANCE	WEAKNESSES (-)		IMPORTANCE
1	Most of those who are eligible to participate in the workforce in Carroll County are employed	Unemployment rate has decreased	1	Communities in Carroll County residing in rural environments	More vulnerable to not having access to testing and treatment for COVID-19. There is also a concern around a lack of awareness as to who is high risk and the general severity of COVID-19.
2	Communities in Carroll County residing in rural environments	Could contribute to the reason the county has a low number of confirmed cases as individuals already function on a social distancing environmental set up	2	Many of those who are employed in this county may have to file for unemployment due to being laid off due to COVID-19	This may then cause the unemployment rate to increase slightly for the county
3	Community is caring and supportive	This is intergal during times of crisis and could be used in mitigation/containment planning (i.e. organizing block level engagement where neighbors keep track of each others needs)	3	The lack of a hospital within the county.	There is a serious lack of infrastructure to screen, test, and treat patients.
4	There is a centralized team for county level containment and mitigation planning	The formation of the centralized team will assist in standardizing responses to COVID-19 across the county	4	There is only one practicing physician in the county.	There is a serious lack of personnel to be equipped to handle a high patient load if there is a major outbreak.
5	Many large employers in the area have already implemented additional precautions related to COVID-19 (i.e. social distancing in lines, extra cleaning processes, tempature checking etc.)	By taking this extra steps, these employers are contributing to containment and mitigation of COVID-19	5	Many of the clinical spaces are appointment only and are not equipped to function as an urgent care and/or ED.	Similar lack of infrastructure, unable to meet urgent needs of patients.
6	There is a health clinic for Indiana Packers employees and family members	This will assist in helping monitor potential cases of COVID-19 in that facility	6	Limited PPE in some of the clinics / health department.	Reduces efficacy with which they can see the patients they can see.
7	There is a functioning postal system that gives mail and packages to almost every address	This could be used if there is a desire to reach residents in remote areas with information on the COVID-19 virus, who is high risk and what they can do.	7	Many clinics expressed little internal planning for potential covid-19 outbreak [due to limited resources / facilities].	They may be able to offer virtual screening but after that there is little they can do to facilitate care.

Thank you for Listening & Engaging!

Questions from the parking lot/ raised hands at this time