STRATEGIC PLAN

“If you have built castles in the air, your work need not be lost; there is where they should be. Now, put foundations under them.”
-- Henry David Thoreau (as quoted in The Community Tool Box)

OVERVIEW

The Strategic Plan is the first step for a coalition or community organization to take in order to move forward in its efforts to create positive change in their community. The process of developing a Strategic Plan helps the coalition clarify, articulate, and formalize its vision for the future and build the foundation for turning dreams into reality. It starts with identifying the current situation in a community, organization, or coalition, and reviewing the outcomes that have been achieved and how they came about.

There are lots of good reasons to take the time to describe the coalition’s hopes for the future and develop a plan for transforming those hopes into goals over the next three to five years. The Community Tool Box (http://ctb.ku.edu) describes some of the reasons a coalition should have a Strategic Plan in place including:

- To make good ideas possible by laying out what needs to happen in order to achieve them
- To build consensus around the focus and the next steps
- To develop the vision and mission together with those in the community who will be affected by the coalition’s work
- To focus on the organization’s short-term goals without losing sight of the long-term vision and mission

This Strategic Plan template is designed to support the planning efforts of field staff and community coalitions and organizations. It is a useful guide for thinking through the necessary components of a Strategic Plan in a systematic way. This tool will help the coalition achieve the following:

- Vision: Describes how things will look if the issue at hand was perfectly addressed
- Mission Statement: Describes what the group is going to do and why it’s going to do it
- Goals: State what the organization wants to achieve
- Objectives: Outline the clear and specific results the organization plans to accomplish
- Strategies: Describe the broad activities needed to get things done and achieve the objectives

The Strategic Plan builds on the work of the Logic Model and provides the information necessary for developing a Work Plan. It is a high-level blueprint for carrying out an organization’s vision and work. The Strategic Plan generally covers a 3- to 5-year period.
## Strategic Plan Template

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STRATEGIC PLAN TEMPLATE INSTRUCTIONS AND DEFINITIONS OF TERMS USED IN TEMPLATE

Note: Terms are listed in order of appearance in the Strategic Plan Template. Also the terms “coalition” and “organization” are used interchangeably in these definitions. The intent is that the templates can be used by a wide variety of organizations – not just coalitions.

Strategic Plan

A Strategic Plan is a coalition’s or organization’s blueprint for carrying out its vision and work. Generally speaking, a strategic plan covers a 3- to 5-year period. It describes the organization’s intentions for the future and strategies to overcome problems in the community.

Priority Area

Every program area has determined what its priority areas are. For example, each of the three public health programs that have been instrumental in the development of these templates (Physical Activity and Nutrition, Substance Abuse Prevention, and Tobacco Prevention) has identified specific priority areas for its focus and work.

Physical Activity and Nutrition has selected the following five goals as priorities: 1) Improve access to and consumption of healthy, safe, and affordable food and beverages; 2) Reduce access to and consumption of high calorie and low nutrient foods and beverages; 3) Raise awareness about the importance of healthy eating and physical activity to prevent obesity; 4) Encourage physical activity, and 5) Decrease sedentary behavior.

Substance Abuse Prevention has determined the following seven areas as its priorities: 1) Underage drinking, 2) Adult binge drinking, 3) Non-medical use of prescription drugs, 4) Alcohol use among pregnant women, 5) Inhalant use, 6) Marijuana use, and 7) Methamphetamine use.

Comprehensive tobacco control in Oklahoma has the following four priorities as its focus: 1) Eliminate secondhand smoke exposure; 2) Prevent youth initiation; 3) Promote tobacco cessation services, and 4) Reduce tobacco industry influences.

Other public health priority areas and issues (such as economic development, child health, mental health, suicide, teen pregnancy, fluoride, dental care, etc.) also establish priority areas as well. To obtain more information about what those priorities are, contact the program area directly.

Each of the three public health issues (Nutrition and Fitness, Substance Abuse Prevention, and Tobacco Prevention) has identified specific priority areas for its focus.

Nutrition and Fitness has selected the following five goals as priorities: improve access to and consumption of healthy, safe, and affordable food and beverages; reduce access to and consumption of high calorie and low nutrient foods and beverages; raise awareness about the importance of healthy
eating and physical activity to prevent obesity; encourage physical activity; and decrease sedentary behavior.

*Substance Abuse Prevention* has determined the following seven areas as its priorities: 1) Underage drinking, 2) Adult binge drinking, 3) Non-medical use of prescription drugs, 4) Alcohol use among pregnant women, 5) Inhalant use, 6) Marijuana use, and 7) Methamphetamine use.

*Comprehensive tobacco control* in Oklahoma has the following four priorities as its focus: eliminate secondhand smoke exposure; prevent youth initiation; promote tobacco cessation services; and reduce tobacco industry influences.

**Vision**

The vision is a description of the coalition’s or organization’s dream. It is the overall view of what is hoped to be achieved over a specified period of time – what the community will look like when the vision is achieved. A vision statement describes the ideal state of a population or community that the organization is addressing. In the case of tobacco policies, for example, an outward vision statement could be "a tobacco-free society." This view can include systems change in policy, procedure, agreement, etc. (at either the organizational or legislative level), or any other social norms change that is expected. There are certain characteristics that should be part of a vision statement:

- It should be understood and shared by members of the community.
- It should be comprehensive enough to encompass diverse local perspectives.
- It should be inspiring and uplifting.
- It should be easy to communicate.

**Mission**

A Mission Statement describes what the organization, group or coalition aims to accomplish and why it serves as the compass. A clear Mission provides focus and reduces confusion and conflict. An essential element of the Mission Statement is that all members of your organization or coalition agree on it and that there is a shared commitment to the aim of the group.

The Mission Statement declares "why" a coalition or organization exists and is the foundation upon which a long-range strategic plan can be developed. It is similar to the vision statement but is more concrete and action-oriented. The mission statement refers to the problem and gives a suggestion of what the coalition or organization might do to fix the problem.

- Mission statements should be concise, outcome-oriented, and inclusive. A Mission Statement should be simple, not flowery or slogan-y. They usually begin with “To…” This speaks to their sense of action and of turning your vision into practice. Mission Statements should be fairly short – it should be something that all coalition or organizational members can easily remember. It should be stated in a way that can be used to hold the coalition or organization
accountable. Here is an example of an effective Mission Statement: “Our mission is to prevent tobacco use and exposure to secondhand smoke in Windy County by providing education and cessation services to all residents, especially those between the ages of 18 and 40.”

Goals

A Goal is a broad, long-term aim that defines the accomplishment of a Mission. Goals are something that the organizations wants to achieve – what it is aiming for – and by achieving it, the organization knows it is accomplishing its Mission.

Goals need to be

- Realistic – the coalition or organization should be sure it can achieve the goal.
- Believable – it must describe situations or conditions that the coalition or organization can achieve.
- Each member and group in the coalition or organization must understand, accept and embrace the goal.
- The goal must allow all members of the coalition or organization to be successful.

Objective

An objective is a measurable result or change due to strategic activities and tasks. Results from these objectives will occur over a specified period of time – usually within a year. Objectives are the specific results a coalition plans to accomplish and serve as the basis by which to evaluate its work. Objectives outline the aims of an initiative–what success would look like in achieving the vision and mission. Each objective should have a timeframe by which it will be accomplished. In the Work Plan, SMART objectives are used:

- Specific – who or what is the focusing; what is the organization going to do
- Measurable – quantity
- Achievable and actionable
- Realistic – are there resources available to implement the intervention?
- Time frame – defined time for achieving the goal

Here is an example of a SMART objective: "To reduce the percentage of youth in our community who smoke at age 15 from 18.5 percent to 16 percent by 2015." There may be several objectives that the organization is working to achieve in a given program year.
**Strategy:**

Strategies are the broad activities required to achieve an objective. They are the means by which policy, programs, and practices are put into effect as population-based approaches (e.g., offering healthy food and beverage options in vending machines at schools, implementing activity breaks for meetings longer than one hour) versus individual-based approaches (e.g., organizing health fairs, implementing cooking classes, disseminating brochures).

A strategy is a way of describing how the coalition or organization is going to get things done -- “How do we get there from here?” (Take the train? Fly? Walk?) Strategies are broad interventions or activities that are required to achieve an objective.

A good strategy will take into account existing barriers and resources (people, money, power, materials, etc.). It will also track with the overall vision, mission, and objectives of the initiative. Often, an initiative will use many different strategies--providing information, enhancing support, removing barriers, providing resources, etc.--to achieve its goals.

Strategies suggest paths to take (and how to move along) on the road to success. That is, strategies help determine how the coalition will realize its vision and objectives through the nitty-gritty world of action.

Strategies include voluntary policy, legislated policy, tribal policy, enforcement of policies, creation of partnerships, and education/awareness. An example of a strategy is as follows: “Establish a partnership with the Area Agency on Aging to support smoking cessation services among seniors in Harmony County.” There can be multiple strategies to support a particular objective.
Strategic Plan Resources

- Communities That Care Curriculum
  
  http://store.samhsa.gov/product/Communities-That-Care-Curriculum/PEP12-CTCPPT

  This series of presentations from the Substance Abuse and Mental Health Services Administration (SAMHSA) equips communities with information to create a public health prevention approach to target youth problem behaviors such as violence, delinquency, and substance abuse. It includes 50 PowerPoint presentations that cover strategic consultation, training, and research-based tools.

- The Community Tool Box: An Overview of Strategic Planning
  

  The Community Tool Box is a service of the Work Group for Community Health and Development at the University of Kansas. This online resource is focused on community-based organizations and coalitions and is very user-friendly. It steps the reader through questions to consider in planning as well as essential elements of a successful “VMOSA” (Vision, Mission, Objectives, Strategies, and Action Plans). Extensive resources are also provided.

- Mobilizing for Action through Planning and Partnerships (MAPP)
  
  http://naccho.org/topics/infrastructure/mapp/framework/index.cfm

  Mobilizing for Action through Planning and Partnerships (MAPP) is a community-driven strategic planning tool for improving community health that was developed by the National Association of County and City Health Officials (NACCHO). This tool helps communities apply strategic thinking to prioritize public health issues and identify resources to address them. MAPP is not an agency-focused assessment tool; rather, it is an interactive process that can improve the efficiency, effectiveness, and ultimately the performance of local public health systems.
Using this Web page, users can access the entire MAPP tool, supplemental resources, and technical assistance. Information on preparing for and completing the process is organized by phase, which users can access using the links above. The "related content" toolbar contains links to additional resources such as technical assistance, case studies, related publications, and materials created by experienced MAPP users.

- **National Association of County and City Health Officials (NACCHO) Tool Kit**


  NACCHO's Toolbox is a free, online collection of local public health tools produced by members of the public health community. The Toolbox contains materials and resources public health professionals and other external stakeholders can use to inform and improve their work in the promotion and advancement of public health objectives. Current examples of tools include action plans as well as other items including case examples, presentations, fact sheets, drills, evaluations, protocols, templates, reports, and training materials.

- **Planning Fundamentals**

  [http://web1.sph.emory.edu/DTTAC/planningFundamentals/index.htm](http://web1.sph.emory.edu/DTTAC/planningFundamentals/index.htm)

  Planning Fundamentals is a self-directed, online course that provides a comprehensive overview of the process for developing and implementing a state health plan for chronic disease prevention and control, including:

  - Describing public health problems using data;
  - Selecting evidence-based interventions to address these problems;
  - Planning the implementation and evaluation of selected interventions; and
  - Documenting this work in a publicly-available and accessible state plan.

  Planning Fundamentals contains eight sequenced modules that follow the step-by-step process of creating a chronic disease state plan with partners; resources are also provided. Planning Fundamentals was created by the Diabetes Training and Technical Assistance Center (DTTAC) at Emory University with support from the Centers for Disease Control and Prevention’s Division of Diabetes Translation.
• Planning Primer: Developing a Theory of Change, Logic Models and Strategic and Action Plans

http://www.cadca.org/resources/series/Primers

This primer from the Community Anti-Drug Coalitions of America (CADCA) provides clear guidelines for assisting coalitions to develop the products needed to carry out a comprehensive community plan to reduce substance abuse rates. It also clarify the dynamic planning process needed for coalition work. Chapter 3 provides guidance on developing a strategic plan.

• Social-Ecological Model

http://www.cdc.gov/violenceprevention/overview/social-ecologicalmodel.html

Prevention requires understanding the factors that influence disease and risky behavior. CDC uses a four-level social-ecological model to better understand the issue and the effect of potential prevention strategies (Dahlberg & Krug 2002). This model considers the complex interplay between individual, relationship, community, and societal factors. It allows us to address the factors that put people at risk for experiencing disease or risky behavior. Prevention strategies should include a continuum of activities that address multiple levels of the model. These activities should be developmentally appropriate and conducted across the lifespan. This approach is more likely to sustain prevention efforts over time than any single intervention.

• The Spectrum of Prevention


The Spectrum of Prevention identifies multiple levels of intervention and encourages people to move beyond the perception that prevention is about teaching healthy behaviors. The Spectrum's six levels for strategy development provides a framework for a more comprehensive understanding of prevention. These levels are complementary and when used together produce a synergy that results in greater effectiveness than would be possible by implementing any single activity.
• **Substance Abuse and Mental Health Services Administration Prevention Training and Technical Assistance Website**


   This website provides detailed and well-referenced information and tools related to SAMHSA’s Strategic Prevention Framework (SPF), a 5-step planning process that guides the selection, implementation, and evaluation of evidence-based, culturally appropriate, sustainable prevention activities. This portion of the website describes the planning step of the 5-step process.

• **Strategic Planning in Smaller Nonprofit Organizations: A Practical Guide for the Process (Jan W. Lyddon, Western Michigan University, 1999)**


   This brief guide is designed to help board members and staff of smaller nonprofit organizations develop strategic plans that can help them strengthen and sustain their organizations’ achievements. It was developed as part of a Nonprofit Capacity Building Project funded by the W.K. Kellogg Foundation’s Youth Initiative Partnerships project.
Strategic Plan Template—Tobacco SAMPLE

Priority Area

Eliminate exposure to secondhand smoke

Vision

The Creek County Child Abuse Prevention Task Force will work within Creek County to establish Clean Indoor Air (CIA) ordinances as the expected social norm. Each community in Creek County has its own personality and traditional ways of implementing change. Creek County communities are mostly rural and attitudes toward tobacco control efforts are less than appealing. However, the coalition understands these challenges and will work to build relationships with local key stakeholders, strengthen partnerships, and provide education about the importance of supporting and adopting CIA ordinances.

Mission

To reduce morbidity and mortality and alleviate the social and economic burden caused by tobacco use in XX County

Goals

1. Proportion of communities with a tobacco-related ordinance or policy encompassing all city-owned/operated property.
2. Extent of smoke-free buildings within multi-unit housing complexes.

Goal 1: Objectives

• By June 30, 2014, increase by 2 the number of communities in Hughes County that have adopted an ordinance or policy designating all indoor and outdoor city-owned/operated property as tobacco-free.

Strategies

• Send Students Working Against Tobacco (SWAT) team and coalition members to attend City Council meetings to first educate the Council and investigate interest in passage of an ordinance or policy.
• Have SWAT team and coalition members return to the City Council at a later date to advocate for passage of tobacco related policies/ordinances.
• Utilize earned and paid media to promote the importance of tobacco-free policies and ordinances, and to celebrate nearby communities that have passed such policies.
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<td>• By June 30, 2014, increase to 3 the number of housing authorities in Payne County that will adopt a smoke free multi-unit housing policy for at least some of the units.</td>
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<td>• Create an updated database of tobacco status for multi-unit housing in the county by November 30, 2013.</td>
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<td>• Survey current tenants’ attitudes toward tobacco use and housing in targeted housing by January 31, 2014.</td>
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<td>• Present survey data to property managers by February 14, 2014. Results of survey will determine the plan of action regarding education and preparing tenants/residents for policy to come.</td>
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Priority Area

1. Improve access to and consumption of healthy, safe, and affordable food and beverages
2. Encourage physical activity

Vision

The long-term vision of the Wellness Now coalition is to help Oklahoma County businesses develop nutrition policies that promote and support health. In order to do this, the Wellness Now Health at Work program and Community Transformation Grant sub-recipients will work to help worksites create and implement nutrition policies. With these collective efforts, worksites in Oklahoma County will provide access to healthy, safe and affordable foods and beverages to all employees.

Mission

To assure the conditions by which our citizens can be healthy through the maintenance and enhancement of physical fitness and nutrition.

Goals

1. Extent of worksites with a nutrition policy consistent with the 2010 Dietary Guidelines for Americans (DGA) for all foods and beverages sold or provided on their premises.
2. Extent of school and school districts with a nutrition policy that supports healthy eating behavior.
3. Extent of worksites with a policy that allows and encourages daily physical activity breaks for employees.

Goal 1: Objectives

• By June 30, 2014, increase from 0 to two the number of worksites in Logan County that implement a full nutrition policy consistent with all elements of the policy checklist.

Strategies

• Work with the local Chambers of Commerce and the County Economic Development Council on presenting to local businesses about the importance of creating a healthy environment.
• Provide sample nutrition policies to interested worksites, and help modify the policy language as needed for the particular County.
• Ask coalition members to write editorial pieces for local media about the importance of nutrition policies in the worksite.
### Goal 2: Objectives

- **By June 30, 2014**, increase to three the number of schools in Johnston and Love Counties that adopt a full nutrition policy.

### Strategies

- Approach school administrators about passing a complete nutrition policy, and provide sample policies they can utilize.
- Conduct a survey of parents to learn the level of support for a nutrition policy. Provide a presentation to the school board with the results.
- Have coalition members present at 3 school board meetings across the county about the importance of being a healthy school.
- Develop media pieces thanking the school for their policy adoption.

### Goal 3: Objectives

- **By June 30, 2014**, increase to 2 the number of worksites that adopt and implement worksite policies encouraging physical activity.

### Strategies

- Trained members will arrange presentations to designated worksites about the importance of physical activity policies, and will encourage worksites to apply for Oklahoma Certified Healthy Business.
- Provide sample physical activity policies to interested worksites, and help them modify the wording as needed for their particular worksite.
- Staff and committee members will promote worksite wellness & physical activity through local media by submitting letters to the editor and providing press releases.