

The NCCP Pathways Project and Tools were developed by Taniesha Woods, PhD, with the assistance of Melissa Christie. Woods has also developed and implemented the process for completing the tools.

USER GUIDE: **STRATEGIC PLANNING TOOL**

Background on the Tool. The purpose of this tool is to guide coalitions in the development and implementation of an evidence-based strategic plan using data and findings from the ECC MAP, Programs and Services Mapping Tool, and Demographic and Community Data Tool. The full coalition should participate in the strategic planning process so that there is buy-in and support to implement the plan. The Pathways Strategic Planning Tool includes concrete steps that a coalition uses to guide and track their progress on addressing outcome(s) and indicator(s) that are in need of improvement. The strategic plan includes outcome and indicator data to be used in conjunction with an Implementation Planner and Timeline. This format makes it possible for coalitions to track the strategic planning progress over time. This tool serves as a template that can be used repeatedly for strategic planning in priority areas that are in need of improvement. In addition to strategic planning for the identified outcome(s), the NCCP Pathways Team recommends that all coalitions simultaneously work on a strategic plan to engage stakeholders. More information on engaging stakeholders is included at the end of this section.

The Strategic Planning Tool helps coalitions:

- **Reach consensus on and identify measurable outcome(s) that will be addressed.** Coalitions will likely identify several outcomes that are in need of improvement, but we recommend only one or two outcomes as the focus of initial strategic planning. This allows the coalition to maximize their resources.
- For example, using the NCCP Pathways tools, a coalition might identify high-quality prenatal care for all families as the outcome that they want to effect. Data and information collected from the ECC MAP, which emphasizes the coalition's vision and stakeholder relationships, and the Programs and Services Mapping Tool, which might show limited capacity in existing prenatal services for low-income pregnant women. The coalition would need to come to consensus that this is the outcome they will effect through the development and implementation of their strategic plan.
- **Select indicator data for measuring progress and providing continuous feedback to the coalition.** A coalition, for example, might use the percentage of expectant mothers who receive high-quality prenatal care as the indicator to measure their progress on implementing activities that have the potential to influence the outcome. The Demographic and Community Data Tool provides guidance about selecting indicator data.
- **Establish specific evidence-based and/or promising activities or strategies for implementation, responsibilities of coalition members, and a timeline for the work.** Using the above mentioned example about the limited capacity of existing prenatal services to accommodate low-income pregnant women, an activity or strategy might consist of 1) outreach and broad-based public information campaigns developed for and by diverse stakeholders and 2) building case

management capacity so that expectant mothers are connected to medical services. Implementing these activities have the potential to improve low-income pregnant women's access to high-quality prenatal care.

Directions for Completing the Strategic Planning Tool

A collaborative process should be used to complete the NCCP Pathways Strategic Planning Tool because successful implementation is more likely when the full coalition has provided input and there is buy-in. The Strategic Planning Tool includes the following steps:

Step 1: Identify the Outcomes. The first step in this process is to start with a discussion about the outcome(s) that are in need of improvement. An outcome is a measure of the effect of an activity/strategy, intervention, or program. The outcome(s) that the coalition selects should align with the coalition's vision. The coalition's vision represents a long-term goal that it hopes to achieve and the identified outcome(s) are based on these ideals. We encourage coalitions to use the findings from previous NCCP Pathways tools to guide decision-making about the identification of outcome(s) that will be the focus of the strategic planning effort. For example, the ECC MAP findings provide information on your coalition's vision and stakeholder relationships, and findings from Programs and Services Mapping Tool can be used to examine where existing capacity as well as gaps and redundancies in programming exist. The Demographic and Community Data Tool provides guidance about baseline indicator data. It is likely that multiple outcomes where the coalition would like to effect positive change will be discussed. However, this tool is intended for strategic planning for up to two outcomes at a time, but the tool can be used as many times as you wish to address additional outcomes.

Step 2: Select the Outcome(s). In this step your coalition will select up to two outcomes to be used for the current strategic plan.

Step 3: Identify the Indicators. The third step in the Strategic Planning Tool is to identify indicators. An indicator is a proportion that measures a meaningful aspect of a health, education, or social service system. In this step, your coalition will identify up to six possible indicators that can be used to assess the influence of your strategic planning efforts including the activities/strategies that are implemented. You will find that the Demographic and Community Data Tool is especially helpful in identifying indicators that the coalition can use for strategic planning.

Step 4: Select the Indicators. In this step, your coalition will select up to three indicators that will be used for strategic planning. Coalition members should ensure that the indicator data that are selected are appropriate for measuring progress of the selected outcomes, are collected on a regular basis, and will be available to the coalition.

Step 5: Implementation Planner and Timeline.

The fifth and final step is the Implementation Planner and Timeline. In this step, along with consultation from experts in the community and the NCCP Pathways Team, your coalition will identify specific evidence-based activities and strategies aimed at facilitating improvements in the selected outcomes and indicators. After choosing an activity to implement, your coalition will break down the overall activity into manageable, concrete actions, with a corresponding timeline and designated subcommittees or coalition member(s) who are responsible for implementation. For example, to influence the percentage of pregnant women who receive high-quality prenatal care, a coalition might decide develop outreach materials about the importance of prenatal care that also includes information about how and where to access low- or no-cost, high-quality prenatal care. Actions might include: reviewing the research to help with creating an engaging and user-friendly brochure that explains prenatal care and on how

to support expectant mothers and fathers, using information from the Programs and Services Mapping Tool to list how to access and where prenatal care is available, creating the brochure, and broadly disseminating the brochure to practitioners, expecting parents, and other central hubs in the community. Each of these actions would be assigned to specific coalition members or subcommittees, the full coalition would decide on a timeline for completion, and engaging external stakeholders in the process would benefit the strategic planning effort. We recommend that sub-committees update the full coalition on at least a monthly basis. Finally, as coalitions work through the NCCP Strategic Planning Tool it is likely that members will think of multiple activities to initiate. To this end, the Implementation Planner and Timeline can be used multiple times and we encourage your coalition to plan as many activities and strategies as are manageable (see the additional template for the Implementation Planner and Timeline).

After Completing the Tool. After completing the Strategic Planning Tool coalitions will have a step-by-step guide for implementing an evidence-based strategic plan that will address the outcomes that coalition members agreed to work on. In addition to the coalition's expertise and experience, the Strategic Planning Tool draws on data to measure progress and findings from the data can be used by the coalition to inform advocacy and resource allocation.

Successful implementation of the strategic plan is a long-term effort. We have found that, generally, at least a one-year timeline is necessary for complete development, implementation, and some measure of meaningful progress. After successfully implementing the strategic plan for the initial outcome(s), the coalition can use the Strategic Planning Tool again to address additional outcomes that are in need of improvement. The Strategic Planning Tool assists with short-term and long-term projects that the coalition will take on.

Resource for External Stakeholder Engagement.

We recommend that all coalitions include ongoing strategic planning to engage stakeholders. Stakeholder engagement is an essential part of a coalition's sustainability and community awareness activities. Stakeholder involvement is beneficial because it diversifies the expertise, perspectives, and resources to which the coalition has access. It is important to view engaging stakeholders as a process of cultivating relationships that are mutually beneficial and founded on trust. Thus, The Strategic Planning Tool for Engaging External Stakeholders is included in the NCCP Pathways tool-kit.

The Strategic Planning Tool for Engaging External Stakeholders has five steps: (1) Refining the Message to Stakeholders; (2) Identifying Potential Stakeholders in the Community; (3) Matching Potential Stakeholders with Coalition Members; (4) Creating Informative Materials for Stakeholders; and (5) Planning Activities for Stakeholder Engagement. After completing the Strategic Planning Tool for Engaging External Stakeholders, coalitions will have a step-by-step implementation guide for reaching out to key stakeholders and engaging them in mutually beneficial relationships.