

## NORC Program Strategic Planning Tool

A strategic plan helps a NORC program consider what it is doing, and why, providing a framework for developing goals, monitoring progress, and communicating more clearly with the many people who have a stake in your program. A realistic plan, developed with input from your partners and advisors, can help you at every stage of program development, including fundraising.

The strategic planning tool offered here is designed to be a guide—there are many different approaches and you should feel free to edit it in a way that meets your needs and style. Some of the basic terminology you should understand as you develop your own plan:

A **goal** is the endpoint you are seeking to achieve.

**Goal:** Involve at least half the older residents in the work of your NORC program.

A **strategy** spells out the specific steps you will take to reach that goal.

**Strategy:** Engage at least 20 older adults as volunteers in the NORC program within the first year.

A **milestone** is a very specific marker to gauge your progress.

**Milestone:** Publish your first newsletter.

**Activities** are the many things that you do on a regular basis to ensure that you achieve your strategies and goals.

**Activity:** Put together a team of senior residents to write a quarterly newsletter.

# NORC Program Strategic Plan

<b>NORC PROGRAM MISSION</b>	
Bring together health care and community resources to work with older residents to support their health and well-being by: <ul style="list-style-type: none"> <li>• Building and supporting relationships and a sense of community.</li> <li>• Identifying and promoting transformation in service design and community support.</li> <li>• Developing and providing access to resources and services that enable older adults to age successfully in place.</li> </ul>	
<b>NORC PROGRAM VISION</b>	
Residents will be able to age in place with access to all of the medical and community services they need, and will be active partners in designing services and maintaining the community.	

<b>THREE-YEAR GOALS 2008-2010</b>			
<b>Goal 1</b> Achieve participation of at least xx percent of older residents in NORC program activities	<b>Goal 2</b> Ensure that older residents are able to stay in their homes as long as possible.	<b>Goal 3</b> Develop an infrastructure to identify needs proactively, support innovation, and coordinate community, volunteer, and older resident participation.	<b>Goal 4</b> Diversify NORC program funding sources to ensure a stable budget for current activities and ready sources to fund new activities.
<b>STRATEGIES (to meet goals)</b>			
<b>Strategy 1</b> Establish a residents' council to plan and lead activity. (First 6 months)	<b>Strategy 1</b> Identify community partners and potential funders interested in assisting in this work; convene an advisory council. (Year 1)	<b>Strategy 1</b> Establish initial roles for staff and volunteer positions and incorporate into a three-year, continually updated budget (Year 1)	<b>Strategy 1</b> Obtain ongoing commitments from housing entity and define the conditions for continuing. (Year 1 and ongoing)
<b>Strategy 2</b> Through residents' council, select and implement at least three non-medical community support initiatives. (Year 1)	<b>Strategy 2</b> Develop a work plan and funding requests to support a needs assessment and initial planning. (year 1)  Milestone: Get funding.	<b>Strategy 2</b> Include a volunteer coordinator in your budget Develop ambitious goals for this position in order to identify and develop new services. (Year 1-2)	<b>Strategy 2</b> Develop a list of potential funders and areas of interest, and regularly communicate with these funders, submitting new projects that support your mission. (Ongoing)
<b>Strategy 3</b> Include residents in housing governance and NORC program advisory board, and establish participatory elections. (Year 2 forward)	<b>Strategy 3</b> Inventory current services accessed by residents. Conduct a needs assessment of resident priorities and a gap analysis. Review with the residents' council and the advisory council. (Year 2)	<b>Strategy 3</b> At least semi-annually, schedule a joint meeting with the residents' council and the advisory council. Plan activities to brainstorm innovative services to meet the mission. (Ongoing)	<b>Strategy 3</b> With advisory council, develop a policy agenda, strategy, and budget to pursue legislation that will result in multi-year funding.  Milestone: Legislative action
<b>Strategy 4</b> Initiate resident fundraisers, with resident leadership. Set annual goals. Use funds for needs identified by residents' council. (Year 2 forward)	<b>Strategy 4</b> Develop a list of priorities and an implementation plan and budget, in collaboration with service providers and policy makers. (Year 2)	<b>Strategy 4</b> Develop a succession plan and a multi-year staff development plan with your advisory council. (Year 3)	<b>Strategy 5</b> Generate at least 20% of annual funding from resident activities and dues. (see Goal 1).

## DETAILED WORKPLAN TRACKING SHEET

### Goal 1: Achieve participation of at least xxx of older residents in activities of the NORC PROGRAM

#### Strategies, Activities and Work Plan

<p><b>Strategy 1</b></p> <p>Establish a residents' council to plan and lead activity.</p>	<p><b>Activities:</b></p> <ol style="list-style-type: none"> <li>1. Ask volunteers to identify at least two residents interested in assisting with this start-up work.</li> <li>2. Review Blueprint website for samples of residents' council design, composition, governance, and activities.</li> <li>3. Identify two NORC programs with well-functioning residents' councils, and arrange a site visit to attend a meeting. (At least one resident should attend with the program director.)</li> <li>4. Convene a town meeting to discuss the possibilities and identify design preferences.</li> <li>5. Elect council members, or solicit volunteers.</li> <li>6. Convene. Establish goals and a meeting schedule for the next year at the first meeting.</li> </ol>	<p><b>Timeframe:</b> 9/08 – 03/09</p> <hr/> <p><b>Resource Needs:</b> 100 hours of coordinator time; 4-6 days of volunteer time; advice and support from Blueprint project or NORC program mentor</p> <p>\$500 for travel, meals, and meeting snacks, and for flyers.</p> <hr/> <p><b>Project Leads:</b> Project director Older resident</p>
<p><b>Strategy 2</b></p> <p>Through residents' council, select and implement at least three non-medical community support initiatives.</p>	<p><b>Activities:</b></p> <ol style="list-style-type: none"> <li>1. At second meeting, brainstorm possible initiatives. Identify the objective of each initiative, who will participate and benefit, and whose help is needed to succeed.</li> <li>2. Between meetings, assign resident volunteers to test these ideas with other residents, in preparation for voting.</li> <li>3. At third meeting, review results, and vote on top three initiatives. Develop work teams with volunteer leads for each initiative. Plan to report out monthly.</li> </ol>	<p><b>Timeframe:</b> 9/08-12/08</p> <hr/> <p><b>Resource Needs:</b> Minimal Staff for meeting and follow-up Volunteers</p> <hr/> <p><b>Project Lead:</b> Activities coordinator</p>
<p><b>Strategy 3</b></p> <p>Include residents in housing governance and NORC program advisory board, and establish participatory elections.</p>	<p><b>Activities:</b></p> <ol style="list-style-type: none"> <li>1. Recommend inclusion in advisory council, and request that residents' council establish selection criteria.</li> <li>2. Conduct selection process, and include in advisory council.</li> <li>3. Meet with management to discuss and test concept of participation in housing governance. Develop principles.</li> <li>4. Follow-up with management, draft letter of agreement (with assistance from community partners, if needed) and initiate.</li> <li>5. Fill positions through residents' council.</li> </ol>	<p><b>Timeframe:</b> Year 2 forward</p> <hr/> <p><b>Resource Needs:</b> Project director Volunteer from community</p> <hr/> <p><b>Project Lead:</b> Project director</p>
<p><b>Strategy 4</b></p> <p>Initiate resident fundraisers, with resident leadership. Set annual goals. Use funds for needs identified by residents' council.</p>	<p><b>Activities:</b></p> <ol style="list-style-type: none"> <li>1. Email other NORC programs to request ideas on successful fundraisers or self-funded resident activities; request contact names and email addresses.</li> <li>2. Develop a short summary of the options, and distribute to residents' council.</li> <li>3. Devote a residents' council meeting to reviewing ideas and select a few of interest. Identify leads and match resident leads with someone in the community who can help with design or implementation.</li> <li>4. With the designated leads, establish a start-up budget, fundraising goals, and evaluation criteria.</li> <li>5. Ongoing support to implementation efforts.</li> </ol>	<p><b>Timeframe:</b> Year 2 forward</p> <hr/> <p><b>Resource Needs:</b> To be determined</p> <hr/> <p><b>Team Members</b> Project director Resident leads Community partners Work teams</p>

# NORC PROGRAM Strategic Plan

NORC PROGRAM MISSION			
NORC PROGRAM VISION			

THREE-YEAR GOALS (2008-2010)			
<b>Goal 1</b>	<b>Goal 2</b>	<b>Goal 3</b>	<b>Goal 4</b>
STRATEGIES (to meet goals)			
<b>Strategy 1</b>	<b>Strategy 1</b>	<b>Strategy 1</b>	<b>Strategy 1</b>
<b>Strategy 2</b>	<b>Strategy 2</b>	<b>Strategy 2</b>	<b>Strategy 2</b>
<b>Strategy 3</b>	<b>Strategy 3</b>	<b>Strategy 3</b>	<b>Strategy 3</b>
<b>Strategy 4</b>	<b>Strategy 4</b>	<b>Strategy 4</b>	<b>Strategy 5</b>

## DETAILED WORKPLAN TRACKING SHEET

<b>Goal 1:</b>		
<b>Strategies, Activities and Work Plan</b>		
<b>Strategy 1</b>	<b>Activities:</b>	<b>Timeframe:</b>
		<b>Resource Needs:</b>
		<b>Project Leads:</b>
<b>Strategy 2</b>	<b>Activities:</b>	<b>Timeframe:</b>
		<b>Resource Needs:</b>
		<b>Project Lead:</b>
<b>Strategy 3</b>	<b>Activities:</b>	<b>Timeframe:</b>
		<b>Resource Needs:</b>
		<b>Project Lead:</b>
<b>Strategy 4</b>	<b>Activities:</b>	<b>Timeframe:</b>
		<b>Resource Needs:</b>
		<b>Team Members</b>