Development and Implementation of a Coalition Strategic Plan

Ohio Respite Coalition Process
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The Ohio Respite Coalition is a statewide collaboration among family members, caregivers, advocates, respite providers, agencies, community groups, and state and local government officials who believe everyone could use a break once in a while.

Mission: to educate, advocate, and promote access to respite options for people who care for a loved one.
Overview of Presentation

- Background
- Activity Prior to Strategic Plan Development
- Process used to develop Strategic Plan
- Activity Development and Implementation
- Results
Developing the Strategic Plan

Presentation Objectives:

1. Understand a process for coalition strategic planning
2. Be able to develop goals and objectives for a coalition
3. Be able to identify potential collaborations or partnerships to achieve plan goals
Ohio Respite Coalition

History

- Start March 2011
- Research "state of respite"
- Conduct 7 regional summits
- Needs and Priorities
- Planning Retreat July 2012
Benefits of Strategic Planning

Helps a coalition –

- Focus on what is most important
- Bring about needed change
- Define the direction of the coalition and ability to measure progress
- Establish realistic goals
- Allocate limited resources
The Strategic Plan Process

Needs Assessment/Environmental Scan

- Assess the current situation – who will do this? How will it be done?
- Identify the desired position – what is the vision of the coalition?
- Evaluate gaps and obstacles – how will these be identified?
Needs Assessment

Examples of issues to assess
- Training of respite workers
- Access to respite services
- Public awareness of respite
- Coordination of care
- Service providers
- Funding
- Assessment tools for respite need
Elements of a Needs Assessment

- Collection and analysis of data
- Survey information
- Focus or discussion groups
- Review of public policy
- Review of current situation

Needs assessments take time and should involve as many coalition members as possible.
Environmental Scan

Identify what is available –

- Which populations of people have access to respite? How is it funded?
- Who are the providers doing respite, what are their training and certification requirements?
- How do people find out about respite services?
What do Coalition members want to see –

- Everyone who needs respite, gets it?
- Single point of entry with coordinated care?
- Statewide common curriculum and certification process for respite workers?
- What else?
Evaluate Gaps/Obstacles

From the information obtained through the needs assessment and environmental scan, identify main issues such as gaps in service, lack of funding, obstacles to respite such as provider requirements, laws or rules, regional gaps in service provision, lack of information on service for certain populations, caregiver attitude, etc.
Prioritize

Develop a list of needs that resulted from the environmental scan and needs assessment.

Group these needs into major topic areas – training, access, awareness, etc.

Prioritize the most important needs into 3 or 4 goals.
Identifying a Need Topic

Lack of specialized caregiver training

- Common training/certification process for all caregivers who would be listed in a registry
- Different requirements for caregivers
- No way to find caregivers
Developing a Goal

The goal should have an end date and be specific enough to build strategies and actions to meet the goal.

Example:
By September 2017, develop high-quality training and education program for providers, a common certification process that aligns respite service requirements across systems statewide, and a registry to list all certified providers.
Determine Timeline

As a coalition, decide on the length of time needed to meet the goals of the strategic plan.

A good tool would be a Gantt chart or other timeline that would show action steps by each year of the plan.
Once goals are developed, each needs a plan of action. How will you achieve this goal over time?

Example:
- Review existing training programs for commonalities and facilitate communication among systems
- Develop specific training packages building on a common training curriculum with unique training components for specialized populations
Strategies and Actions

Review existing training programs

Collect caregiver training curricula

Methods of dissemination

Specialized training requirements

Commonalities

Certification process
Exercise

Using this goal – By December 2017, develop high quality training and education program for respite providers, a common certification process that aligns respite service requirements across systems statewide and a registry to list all certified respite providers.

Develop two more strategies with action steps that would help meet this goal.

15 minutes
Coalitions, by their nature, are collaborations among different stakeholders and other partners. In the Strategic Plan, identify both coalition members and others who will be instrumental in carrying out the plan.
What needs to happen first, second, etc.?

- Collect training programs
- Review for commonalities
- Develop core training components
Assign Responsibilities

Who will carry out the strategies and actions of the plan?

Goal → Strategy → Action

Person Responsible!

This is key to success, especially when working in a coalition.
Determinants of Successful Plans

- Commitment
- Previous Planning Experience
- Regular “check in” on implementation
Coalition members determine chronology of activities and assign them to years in the plan.

Example:

**Year 1**
- Develop Marketing Plan
- Review training curricula

**Year 2**
- Utilize 211 system for information
- Develop core curriculum

**Year 3**
- Ensure all I&R systems include respite
- Common certification process
Implementation

Develop an Operational Plan for the coming year. Elements include:

- Goals
- Strategies and Activities for that year
- Responsible Party
- Outcome measures – how do you know you accomplished those strategies and activities
Implementation

- Regularly review the Operational Plan
- Adjust the activities to meet a changing environment –

Example: In Ohio, common curriculum pushed back because of legislative mandate that formed a new committee to look at a common curriculum and certification process.
Examples of some “wins” in Ohio

- Working with 211 (I&R system) in the state to include taxonomy in search database that will link caregiver needs to respite services.
- Completed survey of state agencies’ respite funding and services.
- Assisted the state in developing a portion of the common assessment tool for long term care services on caregiver assessment.
- Worked with the Dept. of Medicaid on developing a respite benefit under managed care.
Resources

Ohio’s and South Carolina’s Strategic Plans
http://www.lifespanrespite.memberlodge.org/strategicpans

www.councilofnonprofits.org/strategic-business-planning-for-nonprofits

Google “coalition strategic plan” for many examples
Questions and Discussion

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