

# Development and Implementation of a Coalition Strategic Plan

Ohio Respite Coalition Process  
Pat Luchkowsky and Jessica Hawk



Ohio Respite Coalition

# Ohio Respite Coalition

- ▶ 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.
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# Overview of Presentation

- ▶ Background
  - ▶ Activity Prior to Strategic Plan Development
  - ▶ Process used to develop Strategic Plan
  - ▶ Activity Development and Implementation
  - ▶ Results
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# 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
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# Ohio Respite Coalition

## History



# 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
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# 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?

# Identify the Desired Position

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?
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# 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

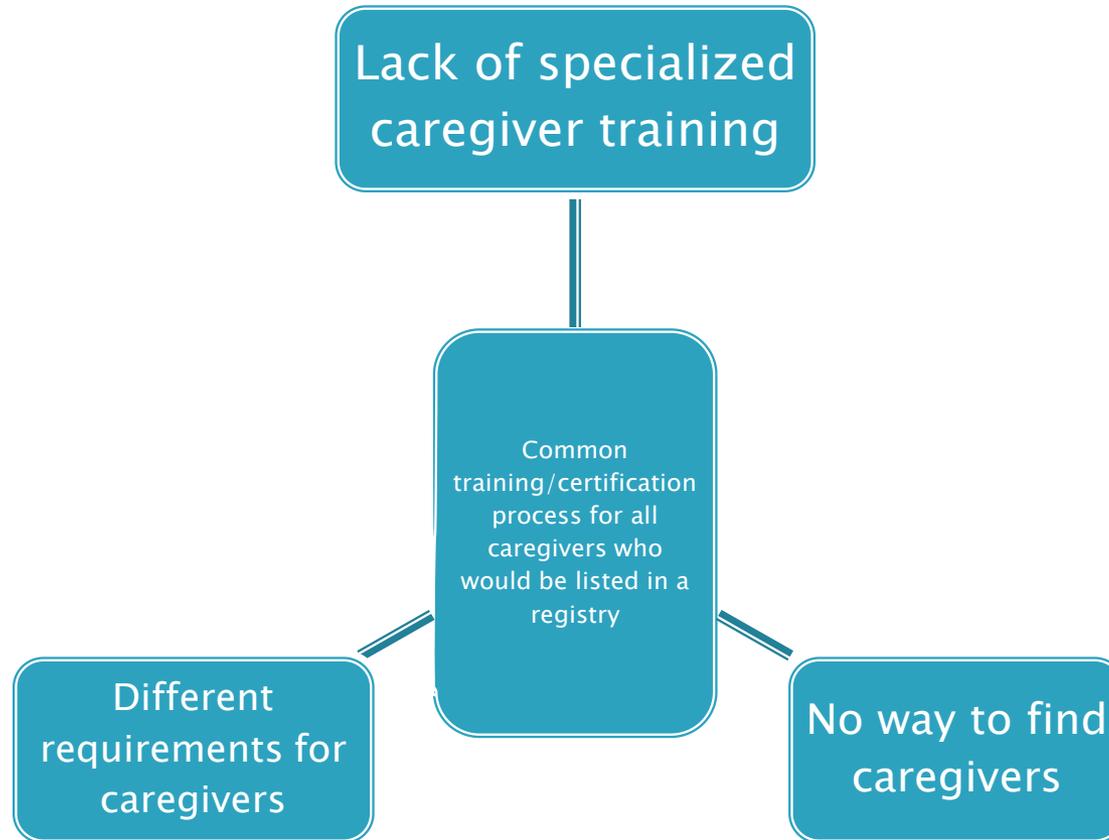
Develop a list of needs that resulted from the environmental scan and needs assessment.

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





# 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.



# Formulate Strategies & Actions

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

Commonalities

Methods of  
dissemination

Specialized  
training  
requirements

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

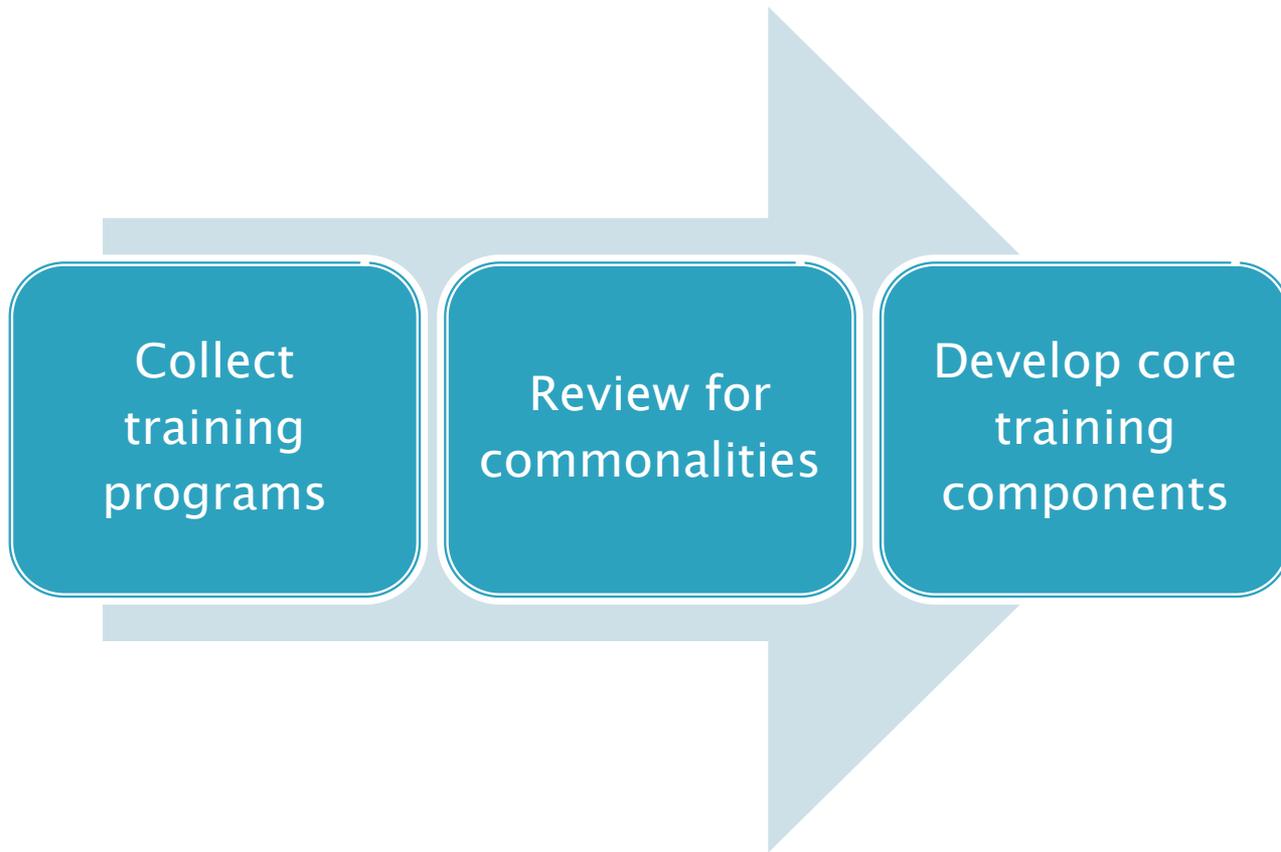
# Identify Key Partners

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.



# Prioritize by chronology

What needs to happen first, second, etc.?





# Assign Responsibilities

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



Person Responsible!

This is key to success, especially when working in a coalition.

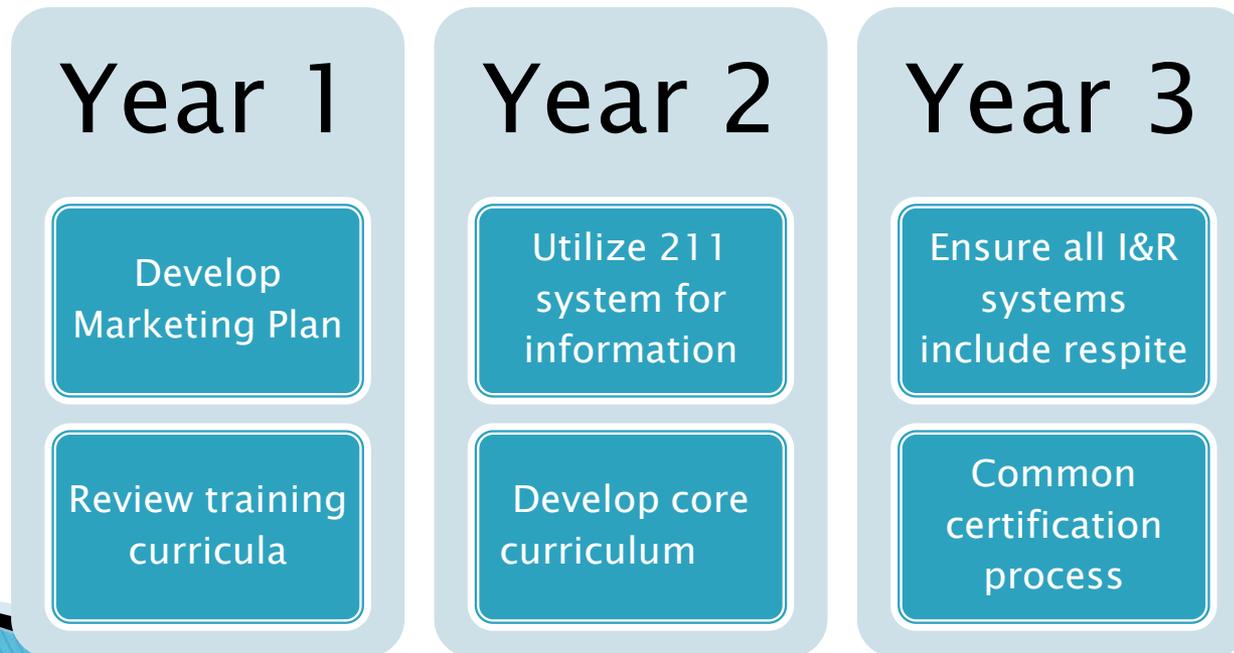
# Determinants of Successful Plans

- ▶ Commitment
  - ▶ Previous Planning Experience
  - ▶ Regular “check in” on implementation
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# Implementation

Coalition members determine chronology of activities and assign them to years in the plan.

Example:





# Implementation

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

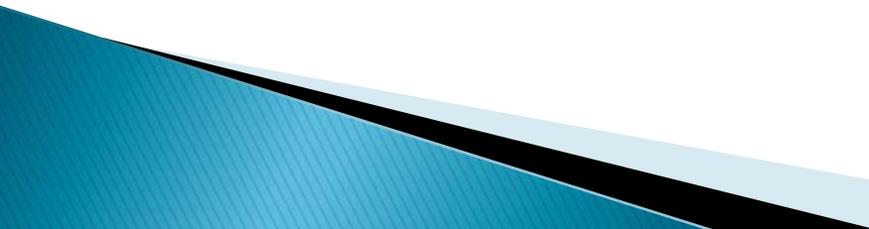
- ▶ Goals
- ▶ Strategies and Activities for that year
- ▶ Responsible Party
- ▶ Outcome measures – how do you know you accomplished those strategies and activities

# 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.
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# Resources

Ohio's and South Carolina's Strategic Plans

<http://www.lifespanrespite.memberlodge.org/strategicplans>

[www.councilofnonprofits.org/strategic-business-planning-for-nonprofits](http://www.councilofnonprofits.org/strategic-business-planning-for-nonprofits)

Google “coalition strategic plan” for many examples

# Questions and Discussion

Contact Information:

Pat Luchkowsky, Director of Public Affairs  
Easter Seals of Ohio

[p.luchkowsky@esohio.org](mailto:p.luchkowsky@esohio.org)

Jessica Hawk, Southeastern Ohio Health  
Information Specialist

Family Voices of Ohio

[jhawkp2p@yahoo.com](mailto:jhawkp2p@yahoo.com)