



The Joys of Strategic Planning



The Joys of Strategic Planning – Really!

Who Are You?



Strategic Planning joyfully

- The Reason Why



The Horror Stories

- Workforce
- COVID
- The Coming Baby-Boomers
- Grow or be swallowed



But this is about the

Joys





Opportunities!

- Numbers growing at a crazy pace
- Middle Market



So, yeah, Horror, Opportunities ...

Why is

Strategic Planning

the answer?



The Joys!

- Take a step back to breathe and reflect
- Reconnect with the joy of fulfilling your mission
- Build a strategic planning team/committee that gathers the knowledge and insight to make solid decisions
- Together, envision of future of possibilities
- Take advantage of the data and wisdom out there
- One of the most powerful tools we have to ensure our success
- Plan your future – don't let it just happen



More Joys!

- Set priorities – allocate human and financial resources for greatest impact
- Make your job easier by defining where to prioritize your time
- Anticipate challenges, have contingency plans, be proactive
- Have a clear road map for accomplishing your goals
- Watch stakeholders align and your community move forward
- Look strategically at partnerships, alliances
- Measure progress, make data driven decisions
- Be confident you're on the right path and your community will thrive



Strategic Planning joyfully

- The Reason Why
- Board Education



Strategic Planning joyfully

- The Reason Why
- Board Education
- Gathering Information



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- **Values – the foundation**



Values

Vote!



Strategic Planning joyfully

- The Reason Why
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- Values – the foundation
- Work with the ED/CEO



Imagine . . .



With Confidentiality, Humanity

Partner Up:

5 minutes each –

Share your dreams for your
community's future



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- Values – the foundation
- Work with the ED/CEO – you are the key



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- Work with the ED/CEO
- Retreat



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- The Matrix



The Strategic Planning Matrix

- Goals
 - Objectives
 - Action Items
 - Tasks
 - Priorities
 - Owners
 - Timelines
 - Metrics



The Strategic Planning Matrix - example

- Goals – Be an employer of choice
 - Objectives – Keep our best staff
 - Action Items – Implement a robust merit raise program
 - Tasks – Model the cost of merit raises vs fewer turnovers
 - Priorities – High
 - Owners – Penny in HR and Ruth in Finance
 - Timelines – Details by June '24, Model by Sept '24
 - Metrics – Turnover of staff rated 4.5 and higher



The Power of a Road Map, a **Fluid** Road Map

- Lays out how you get to your Goals, step by step
- Sits front and center on your desk rather than on the shelf
- It's a framework for accountability
- Review it monthly with your SLT, quarterly with residents and the Board
- It's a Living Document – Keep updating it
 - Record progress
 - Make changes! Keep it relevant, as new opportunities arise, new needs become apparent, and our senior living sector changes



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- Work with the ED/CEO
- Retreat
- The Matrix
- The JOYS



The JOYS

- Reconnect with the joy of fulfilling your mission
- Envision a future of possibilities
- Make your job easier by defining where to prioritize your time
- Have a clear road map for accomplishing your goals
- Be confident you're on the right path and your community will thrive



Q&A



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Thank you



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