The Joys of Strategic Planning

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– Really!

Who Are You?



The Reason Why

The Horror Stories

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

But this is about the



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

- The Reason Why
- Board Education

- The Reason Why
- Board Education
- Gathering Information

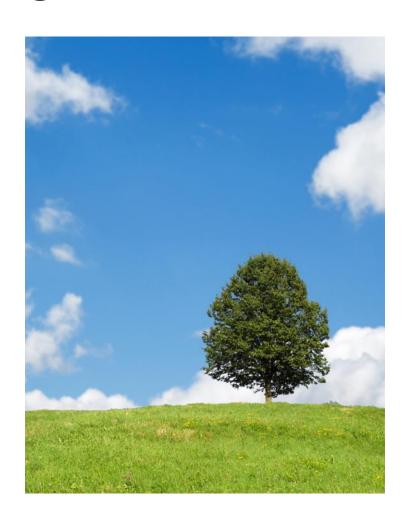
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- Values the foundation

Values



- The Reason Why
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- 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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- Work with the ED/CEO you are the key

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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

- The Reason Why
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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

Thank you



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