

BLUEPRINT FOR A STRATEGIC PLAN

Shared guiding principles help to shape the focus of community planning, drive decision-making and goal-setting, and shape culture. You may not refer to your guiding principles daily, but they are useful to ensure that the long-term culture of your system of care is not eroded by decisions made for short-term expediency. When a significant choice is proposed in systems design, development, or evaluation, you are able to refer back to guiding principles to ensure that short-term and convenient choices do not have a long-term negative impact on the outcomes you want to achieve. Guiding principles describe the organization's beliefs and philosophy pertaining to quality assurance and performance improvement. The principles should guide what, why, and how your system of care does what it does.

Example of Guiding Principles:

Systems of Care are designed to ensure availability and access to a broad, flexible array of effective, community-based services and supports for children and their families that address their emotional, social, educational and physical needs, including traditional and nontraditional services as well as natural and informal supports.

What you'll need:

- Paper and pens for brainstorming. Index cards that are color-coded for responses to specific questions work great.
- A whiteboard or big flip charts for the group facilitator.

Who you'll need:

- An objective facilitator, someone who can keep the ideas flowing and conversations going.
- 10 to 30 members of your core leadership team.

How much time you'll need:

- Two to three hours

Part 1.

Steps to Developing Your System of Care’s Guiding Principles *

1. Educate your team on what guiding principles are and why they are important.

2. Ask your team to identify a scenario in which the system of care provided services and supports that met the unique needs of a child and family with complicated behavioral health needs. What were the behaviors and factors that led to that success?
Examples may include: services were provided at the time, location, and in the preferred language of the family; family members determined what services they wanted and needed; youth’s voice was sought and prioritized, etc.

3. Ask your team to identify the characteristics of a service provider who exemplifies your goals as a system of care.
Examples may include: the service provider is authentic, honors family voice, engages youth, is creative, finds ways to create successes, etc.

4. To draft the guiding principles, consider the characteristics of the successful services, supports, and service providers and use those ideas as a springboard for your discussion.
Example: Our list of successful services and service providers includes concepts such as authenticity in service provider, cultural competence, respect for family voice, youth engagement, and creative interventions. Our guiding principles should include those elements.

GUIDING PRINCIPLES: _____

* Adapted from <http://www.leadstrat.com/blog/facilitating-guiding-principles-2/>

5. Now that you have a solid list of principles you believe in, you can begin to put them together and have those drive your goals.

Example: We believe in youth engagement; therefore, we will seek to hire a young adult peer recovery specialist to be part of our team. We believe in cultural and linguistic competence; therefore, we will ensure all written materials are written in the preferred languages and reading levels of the youth and families we serve.

Part 2

Steps to Identifying Your Objectives

6. Once you have identified your shared goals, your group can identify the specific objectives and strategies – your “to do” lists – that will help you chart the course to meet your goals.

Objectives are the specific program changes, activities, and milestones necessary to accomplish the goal. Each goal may have several objectives, but typically not more than three or four. To identify the objectives, review your goal and determine the program changes or new activities needed that would help you make progress towards your goal. An example is provided on the following page.

To achieve objectives, you will need to identify the specific strategies you’ll use. **Strategies** are the tasks and action steps necessary to accomplish the objectives. Strategies clearly identify the task to be done, the person responsible for getting it done, and the deadline for task completion.

As needed, **Action Plans** are useful tools to identify the discrete tasks needed to accomplish more complicated strategies. Action plans identify the specific steps, persons responsible, and timelines necessary to complete an identified strategy.

An example strategic planning document featuring guiding principle, goal, objectives, and strategies and blank templates is provided for your review and use. Feel free to adapt the templates to meet your needs.

EXAMPLE	EXAMPLE	EXAMPLE	EXAMPLE	EXAMPLE	EXAMPLE	EXAMPLE
<i>Guiding Principle</i>	<i>We believe that cultural and linguistic competency is a critical component of quality care for youth and families across all youth-serving systems in our system of care.</i>					
Goal 1.	Provide effective, equitable, understandable, and respectful quality care and services that are responsive to diverse cultural health beliefs and practices, preferred languages, health literacy, and other communication needs (National CLAS Standard 1).					
Objective 1.1.	Ensure all written materials given to families and youth are provided in their preferred languages and reading levels.					
	<i>Strategy</i>	<i>Who is responsible?</i>	<i>By When?</i>	<i>Progress/Notes</i>		
	1. Research preferred languages and reading levels of current families.	Shanique (child protective) James (juvenile justice) Sofia (mental health) Arjana (family) Julie (family)	March 1	Underway		
	2. Research common languages in the service area.	Andrés (university)	March 1	Underway		
	3. Review current written materials for available languages and reading levels.	Each agency representative and family representative will review own agency's materials.	March 1	Underway		
	4. Revise all documents as needed.	Document Drafting Subcommittee Chair: Nicolas	June 1			
	5. Procure expert translations of documents.	Andrés (university)	August 1			
	6. Review translations and revised documents; provide feedback to committee.	Arjana (family representative) and family volunteers	October 1			
	7. Finalize documents and disseminate to providers.	Each agency representative	November 1			
	8. Establish agency policies that all new documents introduced will be translated into appropriate languages.	Each agency representative	January 1			

Template for Principles, Goals, Strategies, and Objectives				
<i>Guiding Principle</i>	<i>We believe</i>			
Goal 1.				
Objective 1.1.				
	<i>Strategies</i>	<i>Who is responsible?</i>	<i>By When?</i>	<i>Progress/Notes</i>
	1.1.1.			
	1.1.2.			
	1.1.3			
1.1.4				

Template for Action Plans to Meet Specific Strategy				
Strategy 1.1.1.				
	<i>Steps</i>	<i>Who is responsible?</i>	<i>By When?</i>	<i>Progress/Notes</i>
	1.1.1.A			
	1.1.1.B.			
	1.1.1.C.			
1.1.1.D				