

# Strategic Planning Toolkit

*Building a Sustainable Future for Senior Clubs & Centres*

*A Practical Guide for Boards, Volunteers & Staff*

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## **ABOUT THE OACAO**

The Older Adult Centres' Association of Ontario, which was founded in 1973, is an incorporated non-profit provincial organization and a registered charity. The OACAO is funded entirely through membership fees, business partnerships, educational training ventures, management of special projects and various revenue generation initiatives.

## **MISSION STATEMENT**

The OACAO is a recognized leader in the development of quality services, resources and supports for our network of community based older adult centres.

## **MEMBERSHIP**

The OACAO has a membership of 160+ centres, organizations and individuals involved in working with older adults representing over 300+ staff and 160,000 older adults across Ontario.

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## Older Adult Centers' Association of Ontario

# STRATEGIC PLANNING TOOLKIT

### *Building a Sustainable Future for Senior Clubs & Centres A Practical Guide for Boards, Volunteers & Staff*

This Strategic Planning Toolkit was developed with the intent to be a very user-friendly, practical and easy to implement guide for older adult centres, Elderly Person Centres and seniors clubs and organizations across Ontario. It recognizes that some of these centres and clubs are fully run by volunteers or with minimal staff resources. The 2013 Older Adult Centres' Association of Ontario (OACAO) Membership Profile Survey revealed that 19% of the OACAO membership reported never having completed a strategic planning process for their centre. This toolkit is intended for those who have never done a strategic plan or those who do not have a formal planning process in place. It is also to be used as an educational resource to help board and staff members better understand why and what steps an organization can take to achieve their overall goal or vision. A strategic plan will focus the energy, resources and time of an organization in the same direction.

The OACAO is appreciative of the funding provided by the Ontario Seniors' Secretariat to complete this initiative which will assist organizations to develop robust strategic plans. As part of the initiative, the OACAO Executive Director spoke on the importance of strategic planning and presented the 'Toolkit' to the volunteer leaders attending the Northern Tour Senior Fairs in September. The participants of the training provided valuable feedback and suggestions that contributed to this practical guide for senior centres and clubs.

For further information, please contact Sue Hesjedahl, Executive Director, at the OACAO at 1-866-835-7693 or [sue@oacao.org](mailto:sue@oacao.org).

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# Contents

1. A Future With Direction .....	3
2. Step 1 Environmental Scan .....	7
3. Step 2 Strategic Priority Setting .....	11
4. Step 3 Specific Goals .....	12
5. Step 4 Action Plan .....	13
6. Step 5 Review .....	14
7. Successful Fundraising .....	15
8. Appendices:   A: Participant Input Questionnaire .....	16
B: Action Plan Worksheet .....	17
9. Credits & Other Helpful Resources .....	18

## **A FUTURE WITH DIRECTION**

### **Strategic Planning is a Road Map to the Future**

A strategy is an overall approach and plan. Strategic planning is the process of defining an organization's direction and making conscious decisions on allocating your resources, including capital and people, to complete the work fulfilling your Centre's mandate. Strategic planning takes you outside the day-to-day activities of your Centre. It provides you with a big picture view of what you are doing and where you are going. Strategic planning gives you clarity about what you actually want to achieve and how to go about achieving it. It is not a plan of action for day-to-day operations.

Successful leadership is consciously choosing to be clear about your Centre's direction. If you don't change anything, then your future will be no different than the past. A strategic plan is a document that outlines the steps that an organization will take to achieve the stated overall goal or vision. It is key for the board and senior staff to have a shared understanding of who you are, where you are heading and to identify the high-level priorities that will help guide the journey.

**Strategic Planning is the formal consideration of an organization's future course. It addresses three key questions:**

1. "What do we do?"
2. "For whom do we do it?"
3. "How do we excel"

This toolkit will provide you with information on approaches and steps that an organization can take to accomplish a strategic planning exercise. Although five common methods for strategic planning are listed on the next page; there are many more to choose from. In order to achieve a common overall goal or vision strategic planning must be seen as a fluid movement that is clearly thought out and implemented in a way that is true and unique to your group. This toolkit also provides a brief introduction to fund development planning with the recognition that an organization may require added financial resources to carry out their plan.

**“IF YOU DON'T KNOW WHERE YOU ARE GOING, ANY ROAD  
WILL TAKE YOU THERE”**

*Lewis Carroll*

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## **Strategic Planning Tools**

There are numerous sources of strategic planning tools including books, articles, and videos that will assist you with planning steps. Here are brief descriptions of some of the classical methods that your planning team may choose to adopt:

**1. Brainstorming** - Brainstorming can be helpful for the rapid generation of creative ideas. It begins with the group identified improvement goal, such as to increase the effectiveness of your centre's health and wellness programs. Team members make rapid suggestions on how to achieve this. Record all suggestions including those that may seem strange or impractical. All ideas are acceptable, and no one is allowed to criticize another person's suggestion. All ideas will be evaluated for feasibility, cost and other decision criteria. This will result in a small defined set of proposals to support your future direction.

**2. Problem Statement Guidelines** – This method is helpful when improvement goals are uncertain, vague and poorly defined. You apply problem statement guidelines to sharpen the definitions of any problem into its *what, when, where, who, why, and how* dimensions. Each team member is asked to state the problem according to these guidelines. In a subsequent step, you compare these statements to make a final problem statement acceptable to the group as a whole.

**3. Strengths and Weaknesses, Opportunities and Threats (S.W.O.T.)** - A S.W.O.T. analysis is a strategic balance sheet of an organization; that is the strengths of the organization, the weaknesses of the organization, the opportunities facing the organization, and the threats facing the organization. It is a traditional analytical tool to help an organization to understand itself, take advantage of strengths and opportunities and be aware of weaknesses and threats.

**4. Problem Trees** - For complex issues, a way to systematically identify causes and effects may be with the help of a problem tree. A problem tree is a diagram of boxes and arrows that show causes at a low level, leading to effects at a higher level. The causes are the roots of the tree, and the effects are the fruits. Team members will list different problems, and then connects them with arrows to show linkages. This is repeated several times until the problem tree is complete and logical. The problem tree can clearly reveal fundamental, deep-rooted explanations.

**5. Logical Framework** - The logical framework encourages planners to specify cause-and-effect relationships, and to explicitly state all assumptions. At the top of the framework is a clearly defined goal. Lower levels of the framework specify the *why, what, and how* to achieve this goal. For these linkages to be possible the internal logic of planning must be sound and assumptions must be valid.

## **THE STRATEGIC PLANNING CYCLE**

Strategic planning is the process looking at the overall vision, mission and mandate of an organization and developing an action plan to guide decision making and the allocation of the organization's resources. A Strategic Plan will assist the Board of Directors to articulate a long term clear sense of direction to support the work of the board, staff and volunteers. Strategic planning can be a tool to rejuvenate energy and commitment within your organization, foster teamwork with staff and build stakeholder relationships.

The strategic planning process involves following various steps that will help guide you to identify priorities, determine what is and is not possible. There are many resources available that outline a variety of different approaches to strategic planning. The following are the basic steps for strategic planning that will support an effective and efficient approach for your centre, provide good detail for decision making and require minimal time commitments to complete.

### **The Strategic Planning Cycle**

The following is an outline and summary of a step by step process that can assist your group with its' strategic planning. It is worth noting that one step could be eliminated or the order adjusted to suit the needs of your group and either way your group will achieve success. The team may decide to skip Step One: Environmental Scan and start with Step 2: Prioritizing.

**Step 1: Environmental Scan** – Create the planning team; establish purpose and reason why the older adult centre is doing a strategic plan; develop or reaffirm the centres' vision; mission and values; apply the S.W.O.T. analysis.

**Step 2: Strategic Priorities** – Set strategies and reality checks against the S.W.O.T. analysis.

**Step 3: Specific Goals** – Develop goals and objectives that capitalize on the strengths, improve weaknesses, take advantage of opportunities and minimize threats, communicate to staff and volunteers.

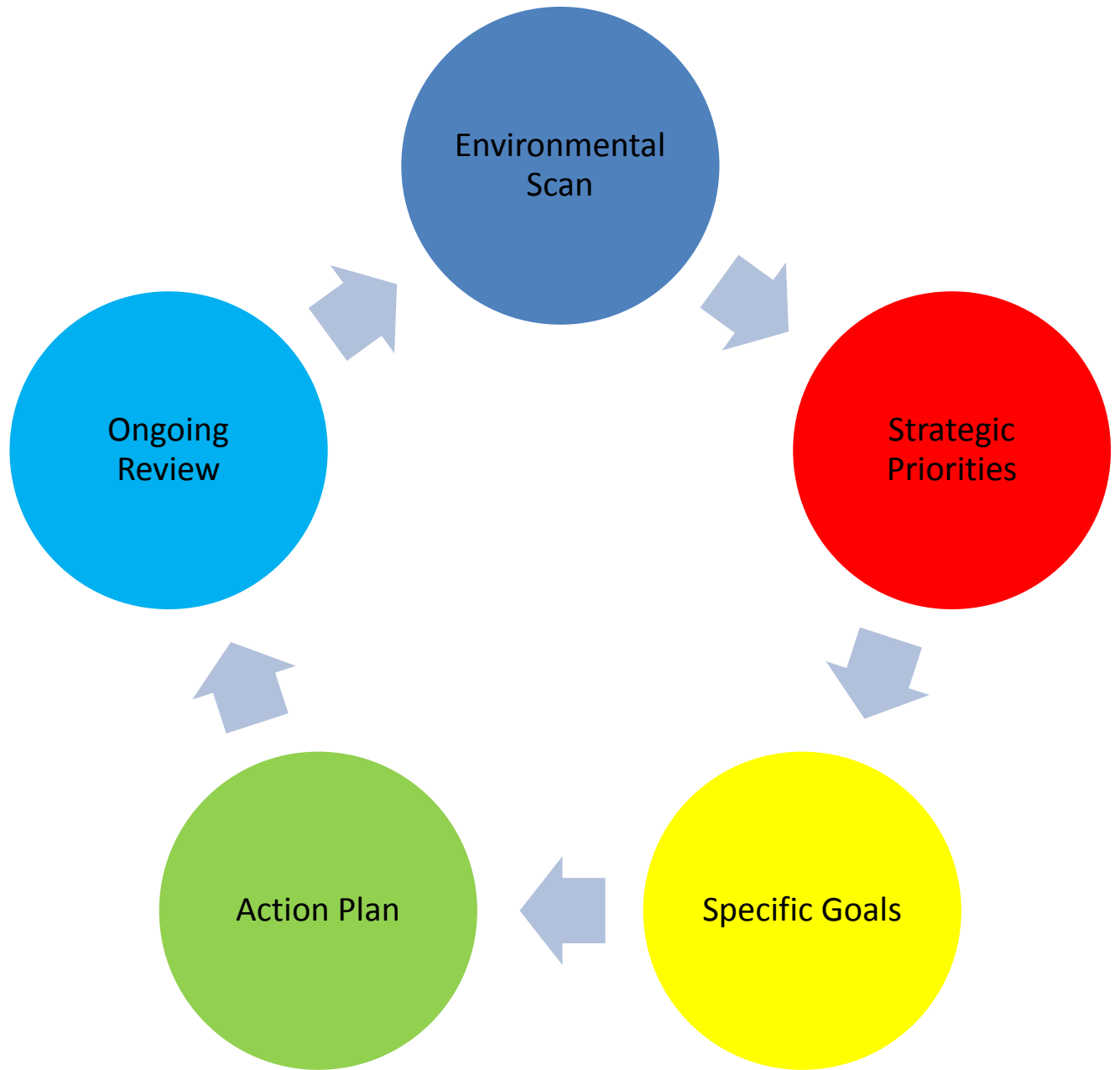
**Step 4: Action Plan** – Develop action plans and implementation of the plan; these are the tasks to be accomplished and require communication to ensure everyone is operating on the same page.

**Step 5: Ongoing Review** – Filter actions against the scenarios to ensure robustness of actions under all scenarios, measure implementation and communicate outcomes to internal and external stakeholders.

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# THE STRATEGIC PLANNING CYCLE



Source: William Krever

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## **STEP 1: ENVIRONMENTAL SCAN**

### **Teamwork & Stakeholder Relationship Building**

A valuable first step when embarking on strategic planning exercise involves forming the planning team. The culture of successful senior centres will hold an expectation that a member-centered approach forms the foundation upon which all future planning occurs. This philosophy involves engaging all members of the seniors population, both current and future members. Also key to the strategic planning team are board members, staff, volunteers and the identified external stakeholders. This thorough consultation process will provide valuable input on draft visions, missions and strategic priorities. **(Participant Input Questionnaire Appendix A is included in the Toolkit)**

People understand and value the importance of relationships with the friends, family, neighbours and colleagues in their personal lives; building and maintaining relationships with other community organizations is also important to your centre or club's success and sustainability. Progress often depends on many different kinds of people playing very different roles. Funders and not-for-profit organizations have become more strategic in building relationships with other organizations.

#### **Group Exercise**

- 1. Brainstorm a list of internal and external stakeholders; include sporting organizations, members, staff, local schools, college and university, community leaders, organizations or local government.*
- 2. List each stakeholder's interest in the organization.*
- 3. List what each stakeholder's expectations of the organization are or might be.*
- 4. List what or how each stakeholder could potentially contribute to the organization.*
- 5. Rank the stakeholders in order of their importance/influence on the organization.*
- 6. Briefly report back to the whole group about your findings.*

It is key to leverage this learning to involve individuals in the strategic planning process or include these individuals in your action plan. They may be involved in implementation or they may be a targeted group to achieve your goals, etc.

Source: Tasmanian Government

Strategic Planning provides the opportunity for an organization to involve many different people from many different vantage points at various stages of the process. As the leader, you will give consideration to who should be involved; who will participate in the planning process; who will chair the meeting; who will facilitate the strategic planning process; what staff,

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### Relationships & Partnerships

- Who and type of partner?
- What function does the partner play?
- Is there unfulfilled potential?
- Strengthen partnership; who is assigned relationship, develop plan to build capacity, provide acknowledgement and recognition?

volunteers and or board members will attend, who will record the notes of the discussion; who will coordinate logistics and refreshments; who will send invitations and prepare reading materials. It is strongly recommended that board members, management, administration and program staff and volunteers have the opportunity to provide insights, knowledge and feedback on the planning process.

As stated previously, it is useful to obtain external input into the strategic planning process. External input may include non-member seniors, members of the community

under 55 years, youth, representatives from different industry sectors and others. It would be negligent to look at the 'big picture' without the society at large having influence on the plan. Having external stakeholder input with a wider view and wider concerns will open doors to new ideas and ways of thinking about the programs and services that your centre provides. An effort to gain external input will ensure that your plan is current, fresh and meeting future needs.

It is important to remember that any investment into the organizations relationships must give attention and priority to the educational and professional growth of the centres' staff, volunteers and board members. Strategic planning is an opportunity for your Board of Directors to learn new perspectives, meet new people, and gain new insights on the operational challenges and successes for your centre. Education provides opportunities for expanding roles, promotions and advancement of staff and volunteers. Investing in people is critical to an organization's sustainability.

It is helpful to discuss and agreed on the ground rules at the onset of your group meeting. Establishing agreed upon ground rules will significantly support the team during the planning process. Examples of ground rules may include; be open to change and new ways of working, challenge assumptions and the status quo, think long-term, stimulate creativity and innovation, make evidence based decisions and confront realities, be open and honest in the assessment of the current situation and provide opportunity for input by all those who are affected by the plans.

## **Tools for Environmental Analysis**

Once you have the planning team in place, it is of great benefit to conduct an environmental scan to determine the current situation of your centre. This involves seeking, gathering and analyzing information to provide an opportunity for a wide look around your centre, local community and province. There are a variety of methods or tools that will help to achieve a clear snapshot of where your centre is now. A selection of alternative analysis frameworks are listed below:

1. **S.W.O.T.** – widely used to consider strengths, weaknesses, opportunities and threats currently affecting the centre or organization or which may affect the centre in the future
2. **SCORE** – this methods builds measurement and continuous quality improvement into the analysis; it identifies strengths, challenges, options, responses and effectiveness
3. **PEST** – looks specifically at the external political, economic, social and technological forces and trends affecting an organization, government or business
4. **SWOR** – analysis is similar to SWOT with perspective that risks provide both positive and negative opportunities; it identifies strengths, weaknesses, opportunities and risks
5. **PESTLE** – similar to PEST identifying trends and anticipates changes in a variety of environments; political, economic, social, technological, legal and environmental trends

Your centre will select the exercise that best suits your approach. This strategic planning toolkit highlights detail of the commonly used S.W.O.T. exercise.

The S.W.O.T. Analysis is a structured framework that is used to evaluate the strengths, weaknesses, opportunities and threats involved in an organization, a project or in a business venture. The chart on the following page outlines the framework for completing the S.W.O.T. analysis.

## ORGANIZATIONAL S.W.O.T. ANALYSIS FRAMEWORK

### **Strengths**

- What we do well
- Assets (human/physical/financial)
- Why do our members come back?
- Human Resources  
(staff/volunteers/members/committees)

### **Weaknesses**

- Something we do poorly
- A disadvantage
- A deficiency in expertise
- What we could do better

### **Opportunities**

- How can we create a competitive advantage?
- Where is the potential to improve/expand?
- Partnerships
- Training

### **Threats**

- Competitive behaviour
- New product/service
- Complacency
- Demographic changes

## **STEP 2: STRATEGIC PRIORITIES**

The second step for strategic planning involves establishing your organizational priorities for setting future direction. Everyone understands that time slips away; a whole day or week can go by with no accomplishments or goals reached. It is human nature to want to do more than what is possible and the reality is that you're not going to be able to do it all at once. Time management systems will assist with planning, but will not identify and rate the importance of each task.

Priority setting is so important for leaders, board members and senior staff of the Centre. It will provide the members, volunteers and staff an understanding of how much work can be accomplished in a given time period and how much resource of time, human resource and finances are assigned to each project.

Priority setting often includes a review of your organization's vision, mission and values. A vision statement clearly states what you aspire to; your ultimate outcome or desired impact on community. A mission statement describes the reason for the organization or why it exists, its purpose and the community it serves.

### **EXERCISE FOR DEVELOPING A VISION STATEMENT**

This exercise will take about 60 minutes. Divide participants into groups of about four or five so everyone participates. You will need flip chart paper, felt-tipped pens and something for sticking up the flip chart sheets.

**Step 1:** Ask participants to describe the three or four key problems they are trying to address and to write these down.

**Step 2:** Ask the groups to imagine that they have been out of the country for ten years. They have arrived back to find that their dreams of how the centre should be, in terms of the problems they have identified, have been fulfilled – the problems are solved and the centre is functioning just as they had always hoped. Draw or construct a picture of what such a centre would look like using colour, shape, words, and/or images.

**Step 3:** Let each group present its picture and explain what it represents. The facilitator should capture key words; especially anything that is value-related (e.g. equal access, affordable, quality health care, equitable allocation, democratic, etc).

**Step 4:** The whole group studies the words and statements and jointly constructs a vision statement that reflects the range of input.

***When everyone is happy with the statement,  
you will have a vision, stated in a vision statement, around which there is consensus. 😊***

Source: Janet Shapiro

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## STEP 3: SPECIFIC GOALS



This third step involves determining what is important; it involves taking a dream, writing it down and giving it a deadline.

Organizational goals will reflect the strategic priorities set by the board of directors and may include operations, output, system, and product and service goals. The goals describe what must be done to achieve the strategic priorities.

When team members are writing goals and objectives it is important to understand that they must be 'SMART' goals; Specific, Measurable, Achievable, Realistic and Timely.

**S**pecific – target a specific area for improvement.

**M**easurable – quantify or at least suggest an indicator of progress.

**A**ssignable – specify who will do it.

**R**ealistic – state what results can realistically be achieved, given available resources.

**T**ime-related – specify when the result(s) can be achieved.

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## **STEP 4: ACTION PLAN**

The purpose of an action plan is to outline the details of the tasks and/or course of action that will accomplish the stated goals. An action plan will lend credibility to your centre and improve transparency; it will demonstrate to your stakeholders, community, funders etc. that your centre is well prepared and committed to achieving its mandate. Senior Staff and/or a board working committee often prepare a high level action plan for each priority cluster. (**Action Plan Worksheet Appendix B is included in this Toolkit**)

### **Communicate, Communicate, Communicate**

Clear and consistent communication is essential to ensuring that all those involved in the activities of your organization are on the same page, moving in the same direction and contributing towards the priorities, goals, objectives and tasks (action plan). Having a good communication plan will help to reduce potential resistance from internal and external stakeholders. Providing an opportunity for individuals to express their concerns and feel that they have been heard will help to alleviate negative energy or possibly sabotage.

Mullenhaur (2013) lists the common reasons for resistance and ways to addressing concerns:

<i>'You can't plan because there is too much uncertainty.'</i>	Communicate that the plan is not set in stone. It will be continually reviewed and revised.
<i>'These things just sit on the shelf.'</i>	Talk about how the plan will be used once it is completed (e.g. tie into performance reviews)
<i>'It's the senior manager's job to do planning.'</i>	Demonstrate to other stakeholders that they will be affected by the plan and build their confidence about their ability to participate.
<i>'It will restrict our activities, so we won't be able to respond to new opportunities and challenge.'</i>	Communicate the purpose of the strategic plan and how it is distinct from the annual plan. Explain that the plan will guide direction, not set activities.
<i>'It will be a huge amount of work and nothing will really change in the long run.'</i>	Tell people how important it is that they participate in the process in order to ensure that the expectations are reasonable. Also talk about how it will be integrated into the annual plan, not just added on.
<i>'What we are doing now is working, why mess with success?'</i>	Create an environment in which people take an honest look at performance and challenge the status quo. Get those who are comfortable with change to be ambassadors to those who aren't.
<i>'We don't have the time.'</i>	Emphasize that strategic planning is an investment in the agency's future. It will save a lot of time down the road because we'll have a shared sense of priorities. Also, in today's competitive environment, we can't afford not to make the time.

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## **STEP 5: REVIEW**

The final step in the strategic planning framework is ongoing review. An organization's effort to continually conduct performance evaluation will contribute significantly to its sustainability. It will provide documentation of the outcomes and successes; enable leadership to respond to external forces; empower better management decisions and confirm adjustments in direction setting, priorities and action plans to better meet the goals. It is recommended that your Centre routinely conduct an evaluation for a variety of reasons; accountability, transparency, commitment and credibility to all your stakeholders.

A review and performance evaluation is the systematic approach to gaining feedback about programs and services and operational practices. An evaluation that is well-designed and carefully carried out will provide valuable relevant information, insights and feedback from other people and organizations.

There are several types of evaluation methods that are often utilized during a performance review. An evaluation can be conducted either formally as a series of strategically developed questions or informally through anecdotal meetings with stakeholders. Tools that support evaluation include surveys, feedback forms, needs assessment, interviews, quality assurance practices, centres of excellence and standards of performance.

### **What is Program Evaluation?**

*Program evaluation is the systematic process of collecting credible information for timely decision making about implementing, operating, modifying, continuing, or expanding a program (Myers, 1999).*

*The feedback can be used to justify funding requests, market your services and improve programs & services to better meet the needs of the membership.*

It is recommended that board members take the opportunity to discuss the importance of regularly reviewing the plan, monitoring progress and updating the plan. Determine the best system to ensure the review and updating of the plan becomes standard practice throughout the organization. Brainstorm ways to engage and incorporate everyone's input towards the review of the plan; including internal and external stakeholders, committees, board of directors, members, staff and volunteers. In a person-centered environment it is important to ensure that your members have opportunity to have their voices heard.

Note: *The OACAO was approved by The Ministry of Citizenship, Immigration and International Trade (MCIT) Partnership Grant 2015 for Building Evaluation Capacity at the provincial, regional and local levels. The objective of the project is to build evaluation capacity for the OACAO member centres. Valuable evaluation tools and resources will be developed during the 25 month, 4 phase project. Further details can be found on the [www.oacao.org](http://www.oacao.org).*

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## **SUCCESSFUL FUNDRAISING**

The priorities, goals and objectives established during the strategic planning process may create or demonstrate a need for additional funding and financial resources. It is essential that centres conduct ongoing fund development planning and strategic fund accounting to achieve their goals. The competition for donors is strong; there are many valuable organizations with strong mandates and emotional messages that depend on the willingness of their donors to give consistently.

When an organization's efforts are focused on a fund development plan it will ensure an organization-wide awareness of the fundraising process and generate an ownership of philanthropy amongst its members. A fund development plan is similar to a strategic plan providing an overview of the actions required to secure the financing to carry out the mandate and the initiatives in the strategic plan. The fund development plan must be both effective and efficient, that is to secure funds that will provide the greatest return on investment.

### **Components of a Fund Development Plan**

1. Assignments of accountability - staff and volunteers must know what they are responsible for, clearly define what belongs to staff and what belongs to board members.
2. Relationship building strategies - the most important part of the fund development process, funding depends on the relationships your organization builds with the community and supporters.
3. Fund solicitation strategies - face-to-face solicitation always works best and is often the major component of your fundraising efforts so don't forget to include it in your fund development plan.
4. Timeframes - Include a calendar of the fiscal year in the fund development plan. This will help identify key fundraising months, meet important tax deadlines and map out solicitation strategies by month.
5. Evaluation - Define what is measured and when to measure; money, donors, relationships, board member performance. Continued evaluation of the effectiveness of strategies and goals will provide opportunities to make the necessary changes and map progress.

## Participant Input questionnaire

1. Name and role (optional)
2. What are the strengths of our organization?
3. What could our organization be doing better?
4. What has happened in the past three years in the older adult services sector and/or our region that could affect our organization?
5. What opportunities exist for us in the changing older adult services sector and/or our *region*?
6. What threats are facing us in the changing older adult services sector and/or our *region*?
7. Do you think we have a clear mission and vision? Do we know what the purpose of the organization is (mission) and do we know what we would like the organization to look like in the future (vision)?
8. Clear mission Yes/No
9. Clear vision Yes/No
10. Write what you think the mission of the organization is/should be:
11. Write what you think the vision of the organization is/should be:
12. What successes have we achieved and what enabled us to achieve them?
13. What challenges have we not achieved and what prevented us from achieving them?
14. What is the current culture of the organization?
15. What is the most important outcome that you would like to achieve?

## ACTION PLAN WORKSHEET

### Best Ever Active Living Centre for Older Adults

**Goal:**

Draft a one sentence objective for your goal in the box provided.

**Objective/s:**

- Describe a course of action.
- Enable achievement of the objective.
- Actively contribute towards the vision of the organization.
- Key words may include: Foster, develop, provide, prepare, produce, organize, perform, nurture, support, explore, promote, advance, build, introduce, deliver, adopt, sustain and build.
- Examples of Objectives:
  - Goal - governance:  
Manage and strengthen relationship with external stakeholders
  - Goal - participation:  
Develop health fair initiatives and programs that will engage new and diverse participation and membership.

**Tasks:**

Develop actions; including

- priority (High/Low)
- time frame
- financial resources
- who is responsible
- performance indicator (targets)

## Credits & Other Helpful Resources

This toolkit is a collection of research, best practices and creative approaches from a variety of sources. There are numerous resources and strategic planning tools including books, articles and videos that will assist you with the planning steps. We would like to acknowledge the following as invaluable resources in the preparation of the OACAO Strategic Planning Toolkit:

Centre for Research & Education in Human Services; *Building Sustainable Non-Profits* ( 2004)

Charity Village; *Overcoming Barriers to Strategic Planning* (2005)

Charity Village; [www.charityvillage.com](http://www.charityvillage.com)

Conscious Governance; [www.conscious-goverance.com](http://www.conscious-goverance.com)

Graves, Tom; *An introduction to SCORE; Beyond SWOT Analysis, Strategy, Capability, Effectiveness* (2006)

Jackson Hole Community Foundation; *Building a Sustainable Non-profit Organization* (2007)

James, Rick - Common Ground Initiative; *How to Do Strategic Planning*

Krever, William – Older Adult Centres' Association of Ontario; *Strategic Planning for Senior Centres* (2012)

Mollenhauer, Linda - Canadian Mental Health Association; *Strategic Planning Toolkit* (2013)

Older Adult Centres Association of Ontario; *Building Bridges to Tomorrow* (2010)

Older Adult Centres Association of Ontario; *Measuring the Impact of EPC's in Ontario Report on the EPC Outcome Survey* (2013)

Oritz, Broad and Libby Bobiwash; *Community Strategic Planning Toolkit* (2005)

Shapiro, Janet; Civicus, World Alliance for Citizen Participation; *Strategic Planning Toolkit*

Shapiro, Janet; *Strategic Planning Management Tool* (1996)

Social Planning Council of Cambridge & North Dumfries; *Building Sustainable Non-Profits* (2004)

Tasmanian Government; *Strategic and Operational Planning Toolkit* (2015)

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