

Strategic Planning for Senior Centres

A Practical guide to Strategic Planning



Overview

Why Strategic Planning?

**“If you don’t know where
you are going, any road will
take you there”**

(Lewis Carroll)



Overview

Why Strategic Planning?

“If you don’t know where you are going, you will probably end up somewhere else”

(David Campbell)



Overview

Why Strategic Planning?

**“If you don’t know where
you are going . . . You
might not get there”**

(Yogi Berra)

Workshop Overview

1. What is Strategic Planning
2. Strategic Planning Framework
3. Identify Current Situation
4. SWOT/SCORE Analysis
5. Strategic Priorities
6. Goal Setting
7. Examples of Senior Centre Trends

What is Strategic Planning

- Strategic Planning is a road map to the future
- Consciously choosing to be clear about your Centre's direction

If you don't change anything, the future will be no different than the past

A strategic plan is a document that outlines steps that an organization will take to achieve an overall goal or vision

Three steps of Strategic Planning

Identify and evaluate current situation



Define the target – goals and objectives



Determine the path – how you will achieve the target

Strategic Planning Framework

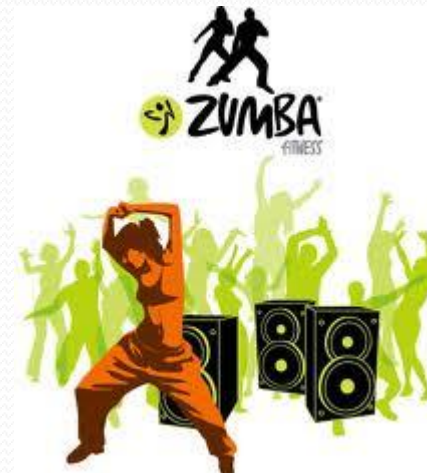


Identify and Evaluate Current Situation

- Situational analysis is the evaluation of the current environment
- Based on data gathered from a variety of sources, a summary will be created to provide an overview of:
 - Market
 - Competition
 - Business environment
 - Internal environment

The Market

- Seniors and aging
- From “boomers” to seniors
- Spanning 40 to 50 year age range
- Impact of the new wave of “Boomers”
- Wellness revolution
- Population elements



The Competition

- Other clubs/centres
- Fitness centres
- Travel
- Volunteer activities
- Doing nothing



Business Environment

- Funding
- Government
- LHIN's
- Local government
- Donations



Internal Environment

- Governance
- Infrastructure
- Budget/Financial Resources
- Staffing resources

SWOT Analysis

- Excellent tool for conducting a quick environmental scan
- Fits well with Strategic Planning Process
- Also a good tool to get widespread input throughout the organization
- **S** – Strengths
- **W** – Weaknesses
- **O** – Opportunities
- **T** – Threats

Swot Analysis

Strengths

- What advantages does your organization have?
- What do you do better than anyone else?
- What do people in your market see as your strengths?
- What is your organization's **Unique Selling Proposition (USP)**

Weaknesses

- What could you improve?
- What should you avoid?
- What are people in your market likely to see as weaknesses?
- What factors might cause individual's not to come to your Centre

Swot Analysis

Opportunities

- What good opportunities can you spot?
- What interesting trends are you aware of?
- What grants or funding are available?
- What new programs or services can you provide?

Threats

- What obstacles do you face?
- What are your competitors doing?
- Are things changing in the senior centre environment?
- Could any of your weaknesses seriously threaten your business?

SCORE Analysis

- An alternative to SWOT analysis
- **S - Strengths**
- **C - Challenges**
- **O - Opportunities**
- **R - Risks**
- **E - Expectations**

SCORE Analysis



Group Exercise

- Develop a SCORE analysis based on your own centre
- Include 2 or 3 examples from each category

Developing a Strategic Priority

- From the environmental scan develop a list of key strategic priorities
- Usually a manageable list of 3 to 5 priorities
- Must be measurable strategies
- Examples
 - To increase the overall membership size by 25%
 - To build a 3 months operating reserve over 2 years
 - To attract 10% younger members to the centre over 3 years

Develop Specific Goals

- After the specific strategic priorities have been developed (3 to 5) it is necessary to develop specific goals under each priority
- Usually from 1 to 3 goals
- These goals should be developed after the strategic priorities are identified
- Should be an inclusive process between governance and leadership

Example: Specific Goals

- Strategic Priority:

To Increase Membership in the Centre by 25%

- Specific Goals:

1. To implement a comprehensive marketing plan to attract new members
2. To add 10 new programs to attract new members
3. To implement evening and weekend programs

Example: Specific Goals

- Strategic Priority:

To build a 3 months operating reserve over 2 years

- Specific Goals:

1. To implement a fund raising program including direct mail, corporate sponsors and special events
2. To reduce facility expenses by 5%
3. To obtain new grants worth \$50,000 per year

More Detailed Approach

Strategic Priorities

- Develop operating reserves

Specific Goals

- Develop a fund raising plan

Specific Objectives

- Direct mail
- Corporate sponsorship
- Special events

Sample: Strategic Priorities Worksheet

OACAO Business Plan Goals and Objectives		
Strategic Priority # 1: Within 3 years, achieve financial stability through a balance budget		
Goal	Objectives	Timeframe/Who
Increase membership revenue		
Increase revenue through business partnership program		
Obtain new government grants		
Develop a 3 year financial forecast		

Group Exercise: Strategic Priorities

- Develop one strategic priority from the SWOT Analysis
- Develop 2 to 3 goals to meet the strategic priority
- For one goal, develop 2 to 3 objectives
- Select a reporter
- Report back to the group

Strategic Priorities Worksheet

Strategic Priority:

Goal	Objectives	Timeframe/Responsibility

Final Thoughts on Strategic Priorities

- Tie in with organizational strategic priorities
- Review strategic priorities on an on-going basis and determine if there are any new goals and objectives



Sample Strategic Priorities

Strategic Priorities				
A range of quality, responsive and accessible services and care.	Skilled and effective staff, volunteers and board members.	A fiscally responsible organization.	An informed and responsive community contributing volunteer and fiscal resources.	Stakeholder engagement
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Strategic Planning Framework

