

## **Local Implementation of the *Wisconsin Nutrition and Physical Activity State Plan* Strategic Planning Example**

The Wisconsin Nutrition, Physical Activity and Obesity Program and the Wisconsin Partnership for Activity and Nutrition (WI PAN) developed the *Wisconsin Nutrition and Physical Activity State Plan*. The State Plan provides a framework to help create and support environments that make it easier for all Wisconsin residents to make healthy food choices, be physically active and achieve and maintain a healthy weight. The State Plan emphasizes policy and environmental changes to support individuals in adopting and sustaining healthy lifestyles.

Coalitions, organizations, or groups that wish to address obesity in their respective communities should begin by developing a strategic plan that supports the implementation of the [\*Wisconsin Nutrition and Physical Activity State Plan\*](#) through local efforts. Strategic plans are helpful when a group is starting a new initiative or large project or when a group wants to invigorate an older initiative that has lost focus or momentum. Moreover, a strategic plan can be used to help a group focus its resources and energy, to ensure that members of the group are working toward the same goals, and to assess and adjust the group's direction in response to a changing environment.

A strategic plan should contain the group's vision, mission, goals and objectives for how it will address obesity. During the strategic planning phase, it is important for your group to develop the following:

- Member commitment;
- Sense of mission;
- Shared values with which to work together;
- Collective vision; and
- Goals that can be translated into action and be measured.<sup>1</sup>

Therefore, **coalitions are expected to develop or have a strategic plan before beginning to design an intervention** (via an intervention action plan) to address obesity. Having a strategic plan will ensure that the intervention(s) are tied back to the group's vision, mission, and goals. For example, a strategic plan is like the picture on a puzzle box; the intervention action plans are the puzzle pieces. The strategic plan ensures that all of the puzzle pieces fit together. It is needed to connect all the efforts (e.g. interventions in multiple settings) and to ensure that each of the pieces tie back to the group's vision, mission, and goals for impacting the health of the community.

### **Tips for a Successful Strategic Planning Process<sup>2</sup>:**

- Define the purpose and direction: Determine exactly what the coalition/organization/group wants to accomplish and why it is necessary to achieve it through a collaborative.
- Commit to a unifying mission: The group's mission will require members to agree to share power and resources; individual agendas must be secondary.
- Involve "key partners" and stakeholders: Identify organizations and community representatives who have similar goals and interests and who will recognize and commit to the benefits of collaboration.

- Identify potential community partners: Actively recruit and consistently include community members and organizations that will benefit from or be impacted by the collaborative activities.
- Define roles: Clearly establish the expectations and responsibilities of the coalition/organization/group and its individual members. Each partner must have a clear understanding of what is expected from him/her and his/her organization.
- Develop decision making processes and ground rules: Design a democratic, inclusive decision making process and firm ground rules that are contributed to and approved by each member and community organization. A memorandum of understanding approved by agency decision makers and community members may be appropriate.
- Share the leadership: Develop a strong leadership and governance structure. Remember that collaboration requires shared leadership by members. Leaders must be impartial and work in the best interest of the collaborative.
- Commit to clear and frequent communication: Effective, thorough communication with and between collaborative members is necessary. Implement formal and informal communication tools early on in the collaborative process to inform members of all decisions and activities.
- Address conflict immediately: Collaboration requires a diverse group of community and agency representatives to work closely together. Conflicts of interest, individual agendas and competition issues will inevitably occur. A conflict resolution process should be developed and approved by members before the first conflict arises.
- Assess current resources, assets, needs and obstacles: Recognize and build upon existing community strengths and assets. Utilize available services and expertise that currently exist to avoid possible duplication. Identify needs, challenges and obstacles to be addressed.
- Develop the group's collaborative vision and goals: Strategically plan realistic, specific and attainable goals and objectives, which will support the mission and purpose of the collaborative.

### **Strategic Plan Example**

Below is one example of how to develop a strategic plan. Of note, there are a few different processes that your group can use to develop a strategic plan. No matter the process that is selected, coalitions are expected to have a strategic plan that contains the group's vision, mission, goals, and objectives prior to designing an intervention.

In this fictional example, a group of concerned citizens came together to form the Healthy Communities Coalition of Golden County. Initial members of the newly-formed coalition included a county public health representative, the local YMCA, and a University of Wisconsin-Extension representative (e.g. Family Living Agent). The group met and decided to begin by doing an asset map of community partners and resources. The asset map identified other potential coalition members and resources, including the need for school district involvement (e.g. a school board member), representatives from Kiwanis (a potential funding source), the Chamber of Commerce, and the local hospital foundation. Local farmers were also identified as a possibility. After the asset mapping was completed, the coalition contacted and encouraged these potential partners to join their efforts. All of the potential partners agreed that preventing overweight and obesity was an important issue to them, and furthermore, demonstrated interest in joining the coalition. Instead of thinking about what types of interventions would be appropriate for their community, the coalition decided it was important to first develop a strategic plan for their future efforts.

**Strategic Plan Example<sup>3,4</sup>:**

<b>Strategic Plan Steps:</b>	<b>Sample Strategic Plan:</b>
<p><b>Step One: Develop a vision &amp; mission</b></p> <p><b>Vision Statement:</b> Describes what we want the community to look like in the future</p> <p><b>Mission Statement:</b> Broad description of what the coalition/group/organization is going to do and why</p>	<p><b>Vision Statement:</b> Healthy people, healthy environments in Golden County</p> <p><b>Mission Statement:</b> To improve the health of residents in Golden County by working together to provide optimal environments for healthy eating and physical activity.</p>
<p><b>Step Two: Complete a community assessment</b></p> <p><b>Define Community:</b> The process of defining your community, which includes the target audience and those who influence or interact with the target audience.</p> <p><b>Gather &amp; Analyze Information:</b> Includes collecting the following:</p> <ul style="list-style-type: none"> <li>● <b>County or Community-Level Data:</b> this data tells the story about the health status of your community</li> <li>● <b>Community Opinions:</b> this data tells you what the target audience thinks is important regarding health</li> <li>● <b>Assessing Programs, Services, Policies, and Environment:</b> this data tells what is influencing health behaviors in your community</li> </ul> <p><b>Summarize &amp; Report Information:</b> Analyze and organize results by common themes,</p>	<ol style="list-style-type: none"> <li><b>1. Define Community:</b> All residents in Golden County; includes 4 communities; 3 school districts and 11 worksites. <b>Community Demographics:</b> Predominantly suburban; primarily middle-income residents (64% of population)</li> <li><b>2. Gather &amp; Analyze Information:</b> <ul style="list-style-type: none"> <li>● <b>County-Level Data:</b> Sent a mail survey to 500 households in Golden County; survey questions asked about self-reported height, weight, fruit and vegetable consumption, and physical activity levels.</li> <li>● <b>Focus Groups:</b> Four focus groups (8 community members each); answered open-ended questions about nutrition and physical activity-related issues.</li> <li>● <b>Asset Map:</b> Identified and surveyed key partners/organizations resources to see what they are already doing and what resources they can commit to the plan</li> </ul> </li> <li><b>3. Summarize &amp; Report Information:</b> <ul style="list-style-type: none"> <li>● <b>County-Level Data:</b> 27% of adult residents are obese; 36% are considered overweight. Only 20% of residents eat 5 or more servings of fruits and vegetables. Only 27% of county adults are active 5 or more days per week.</li> <li>● <b>Focus Groups:</b> Community residents are concerned about obesity, especially amongst children. Residents cited poor access to affordable recreational facilities and opportunities as a major barrier to being physical active. Additionally, residents noted rising food costs and a lack of access to quality fruits and vegetables as</li> </ul> </li> </ol>

<p>barriers, etc. Do the qualitative results (e.g. focus group) explain the quantitative results (e.g. survey)?</p>	<p>concerns.</p> <ul style="list-style-type: none"> <li>● <b>Asset Map:</b> Identified that school district and public health department staff will lead implementation of interventions, Kiwanis and local hospital foundation will help with funding. Local farmers could also be potential partners.</li> </ul>
<p><b>Step Three: Determine priorities, goals, and objectives</b></p> <p><b>Link</b> to the <a href="#">Wisconsin Nutrition and Physical Activity State Plan</a>. Review the goals and objectives in the State Plan and assure that your strategic plan supports its implementation.</p> <p><b>Prioritize:</b> Focus on addressing needs that build on community strengths; where there is community concern and/or support. Consider coalition/organization/group’s capacity/resources to address</p> <p><b>Goal(s):</b> The health impact or result the coalition/organization/group intends to achieve—what the coalition must achieve to fulfill its vision and mission.</p> <p><b>Objectives:</b> Provides direction on how to achieve something bigger like a goal, vision, or a mission. Objectives must be well written; essential to effective evaluation. Set SMART objectives:  <b>Specific</b> – Objectives should specify what you want to achieve.  <b>Measurable</b> – You should be able to measure whether you are meeting the objectives or not.  <b>Achievable</b> - Are the objectives you set, achievable and attainable?  <b>Realistic</b> – Can you realistically achieve the objectives with the resources you have?  <b>Time</b> – In what time frame will it be done?</p>	<p><b>Coalition’s Prioritization:</b> Based on the results of the community assessment, the coalition decided it was important to prevent obesity in Golden County Residents (would include children, adolescents, and adults). The coalition also noted that increasing fruit and vegetable consumption and physical activity were important issues as well.</p> <p><b>Overall Goal:</b> Create an environment in Golden County that promotes and supports healthy eating, being physically active, and a healthy weight.</p> <p><b>Long-Term Outcome Objectives:</b>  By 2015, reduce the prevalence of overweight and obesity amongst Golden County children by 6%.   By 2015, reduce the prevalence of overweight and obesity amongst Golden County high school students by 6%.   By 2015, reduce the prevalence of overweight and obesity amongst Golden County adult residents by 4%.</p> <p><b>Intermediate-Term Outcome Objectives:</b>  By 2013, increase the number of fruit and/or vegetable servings eaten by Golden County children each day by 10%.   By 2013, increase the number of fruit and/or vegetable servings eaten by Golden County high school students each day by 10%.   By 2013, increase the number of fruit and/or vegetable servings eaten by Golden County adults each day by 10%.   By 2013, increase by 10%, the percentage of Golden County children that are physically active for at least 60 minutes a day.   By 2013, increase by 10%, the percentage of Golden County high school students that are</p>

<p>There are also process and outcome objectives. Outcome objectives aim for changes in:</p> <ul style="list-style-type: none"> <li>• Health status</li> <li>• Behaviors</li> <li>• Environment</li> </ul> <p>Generally, it can take a community at least 3 years to achieve outcome objectives. Process objectives provide direction on how to achieve the outcome objective. Communities can expect a time frame of 1-2 years to achieve process objectives.</p>	<p>physically active for at least 60 minutes a day.</p> <p>By 2013, increase the percentage of Golden County adults who are moderately active for at least 150 minutes per week by 10%.</p>
<p><b>Step Four: Finalize the strategic plan</b></p> <p>The coalition/organization/group's strategic plan should include the following:</p> <ul style="list-style-type: none"> <li>• community assessment findings</li> <li>• goals and objectives for addressing nutrition, physical activity, and/or obesity</li> <li>• a plan for evaluating the objectives to document success in achieving or working towards the goal(s)</li> <li>• <b>details about the development of intervention action plans, which may include settings (e.g. schools) or target behaviors (e.g. fruit and vegetable consumption); can include initial thoughts on the approach or high-level strategies to be used (e.g. addressing access to fruits and vegetables)</b></li> </ul> <p>The strategic plan should also include a work plan with details on:</p> <ul style="list-style-type: none"> <li>• what will be done (strategies)</li> <li>• by whom (people responsible)</li> <li>• by when</li> <li>• costs (resources needed)</li> <li>• who should know (partners/collaborators)</li> </ul>	<p>Healthy Communities Coalition members discussed how they will achieve their agreed upon overall goal and outcome objectives. The members first discussed what key settings and/or target behaviors would need to be addressed (fruit and vegetable consumption; physical activity) to effectively reach their identified target audiences (children, adolescents, and adults). Second, they discussed the coalition's current capacity (partners and resources) to impact these settings and target behaviors.</p> <p>Thus, based on the identified partners and resources, the coalition members determined they would begin by developing an intervention action plan for the community setting. The intervention action plan would specifically address the target behavior of increasing fruit and vegetable consumption (by addressing fruit &amp; vegetable access).</p> <p>Next, coalition members developed a work plan that reflected details on the development of their community intervention action plan, determined who would be responsible, and by when. Additionally, they discussed estimated costs and the need for at least a .10 FTE to coordinate their activities and to assist with development of new partnerships.</p> <p>Last, coalition members discussed the appropriate infrastructure and group processes for accomplishing their current (community intervention) and future work (additional interventions). Furthermore, they agreed to assess their coalition's capacity and based on the results; include objectives in their strategic plan to address their identified needs.</p>

<p><b>Step Five: Determine the measures for evaluating the strategic plan (evaluation plan)</b></p>	<p>Based on the outcome objectives, the following evaluation measures were determined:</p> <ul style="list-style-type: none"> <li>• <b>Children:</b> WIC data on weight, height, fruit and vegetable consumption, and physical activity levels</li> <li>• <b>Adolescents (high-school students):</b> Youth Risk Behavior Surveillance Survey data on weight, height, fruit and vegetable consumption, and physical activity levels; collect from high schools in all 4 school districts</li> <li>• <b>Adults:</b> County-wide survey; potentially use the Behavioral Risk Factor Surveillance System data on weight, height, fruit and vegetable consumption, and physical activity levels.</li> </ul>
<p><b>Step Six: Implement &amp; evaluate the strategic plan</b></p> <ul style="list-style-type: none"> <li>• Once the group begins to implement the strategic plan, it is important to check to see if the plan's goals, objectives, and strategies are still appropriate for meeting the group's vision and mission; revise as necessary</li> <li>• Once an intervention action plan has been developed and implementation has begun, coalitions/organizations/groups can consider (based on available resources and partners): <ul style="list-style-type: none"> <li>-Expanding what they are doing to other settings (expand efforts to address access to fruits and vegetables in schools and worksites); requires additional formative assessment</li> </ul> </li> </ul> <p><b>OR</b></p> <ul style="list-style-type: none"> <li>-Developing a new intervention action plans to address another setting or a different target behavior (e.g. physical activity); may require additional formative assessment</li> </ul>	<p>Healthy Communities Coalition members meet frequently to continue working on their respective community intervention action plan. Now that the intervention is underway to address fruit and vegetable access in their community, members are now determining if there are available resources and partners to also address access in the school setting. (This would involve additional formative assessment of students, school staff, and the school environment; coalition could add objectives to their existing intervention plan.)</p> <p>Furthermore, based on the coalition's relationship with the Chamber of Commerce, members are also contemplating addressing the worksite setting. (If not collected during the strategic plan development process, the coalition would need to utilize formative assessment techniques to learn more about the worksite setting (e.g. key informant interviews with business owners). In addition to their community intervention action plan, they would develop an intervention action plan for the worksite setting.</p> <p>Meanwhile, per their assessment of coalition capacity, the coalition is planning to send at least 4 members to training on collaborative leadership/shared power.</p>

References:

1. Roberts. *Alliances, Coalitions, and Partnerships: Building Collaborative Organizations*. New Society Publishers, Gabriola Island, BC, Canada. 2004
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3. The Community Toolbox: <http://ctb.ku.edu>. Accessed on October 14, 2008.
4. Association of State and Territorial Public Health Nutrition Directors. *Moving to the Future*. <http://movingtothefuture.org/>