



Building Peer Strategy

That Guides Our Work

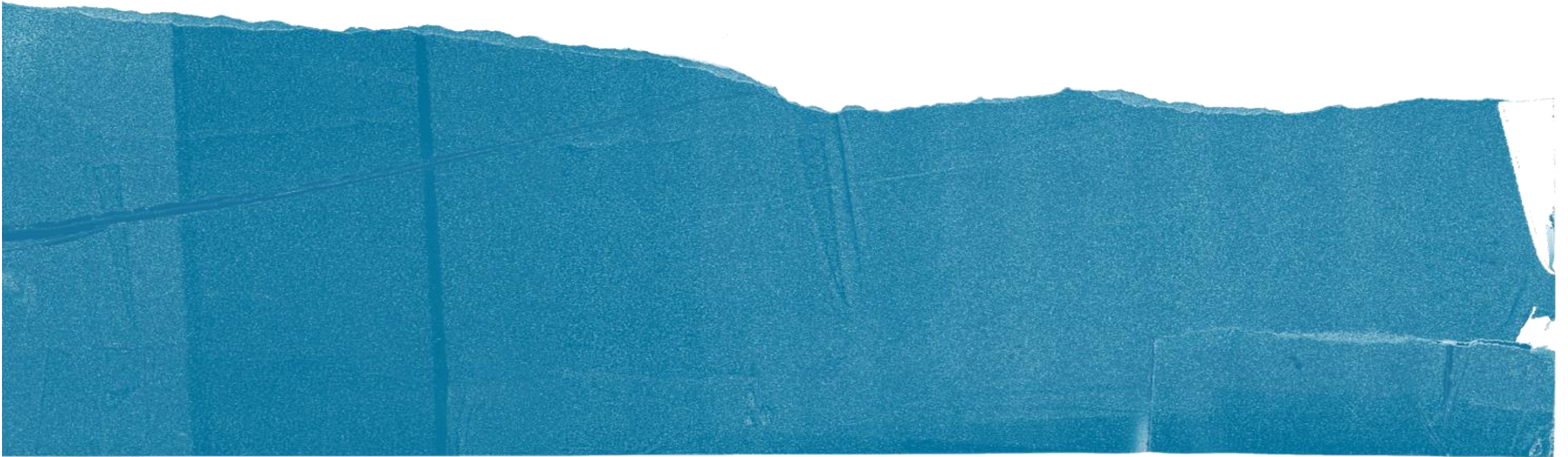
Speakers:

Haven Taylor

Kells Perry

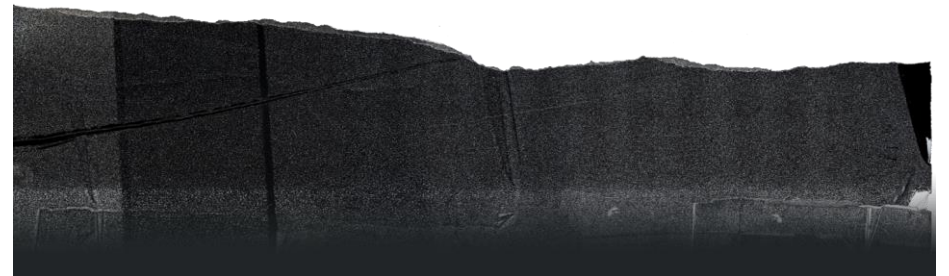
Today's Learning Objectives:

- Understand the role of the Vision Statement in creating a Strategic Plan
- 6 common components that go into Strategic Planning
- Action plan that includes all members of the organization



Mentimeter Activity

- What does "Peer Strategy" mean to you?



Overview



1. Mission Statement
2. Vision Statement
3. SWOT Analysis
4. Strategic Format
5. Goals / Objectives
6. Cascading Action Plan

*“Never doubt that a small group of thoughtful,
committed citizens can change the world.
Indeed, it is the only thing that ever has.”*

~ Margaret Mead ~



Mission Statement

Part 1: **Definition**

- A brief, written statement that describes an organization's purpose, goals, and values.
- It serves as a guide for decision-making and communicates to stakeholders what the organization stands for and what it aims to achieve.

Mission Statement

Part 2: **Application**

- A brief, written statement that describes an organization's **purpose, goals, and values**.
- It serves as a guide for decision-making and communicates to stakeholders what the organization stands for and what it aims to achieve.

New Narrative's Mission Statement:

- From clinical care and peer support programs to housing, we provide the resources so people seeing mental health care can develop the tools to thrive, not just survive

Overview

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Your vision will become clear only when you look into your heart. Who looks outside, dreams. Who looks inside, awakens.



MotivateUs.com

Carl Jung

Vision Statement

Part 1: **Definition**

- A vision statement is a concise, future-oriented declaration that describes the desired long-term state or outcome that an organization or individual wants to achieve.
- It articulates the aspirations and goals of the organization or individual and provides a clear picture of what success looks like in the future.

Vision Statement

Part 2: **Application**

- A vision statement is a concise, future-oriented declaration that describes the **desired long-term state or outcome** that an organization or individual wants to achieve.
- It articulates the aspirations and goals of the organization or individual and provides a clear picture of what success looks like in the future.

New Narrative's Vision Statement:

- We envision a world where lived experiences are valued and integrated, creating meaningful change and opening paths to purpose, connection, and community

Overview

✓ 1. Mission Statement

✓ 2. Vision Statement

→ 3. SWOT Analysis

4. Strategic Format

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S.W.O.T. Analysis

Part 1: Definition



- SWOT analysis is a strategic planning tool used to assess the internal and external factors that affect an organization's ability to achieve its objectives.
- The acronym stands for **Strengths**, **Weaknesses**, **Opportunities**, and **Threats**.
 - Strengths and Weaknesses refer to the internal factors that an organization can control.
 - Opportunities and Threats refer to external factors that are outside of their control.

By analyzing these four factors, a SWOT analysis helps identify areas to develop strategies to maximize its strengths, minimize its weaknesses, capitalize on opportunities, and mitigate threats.

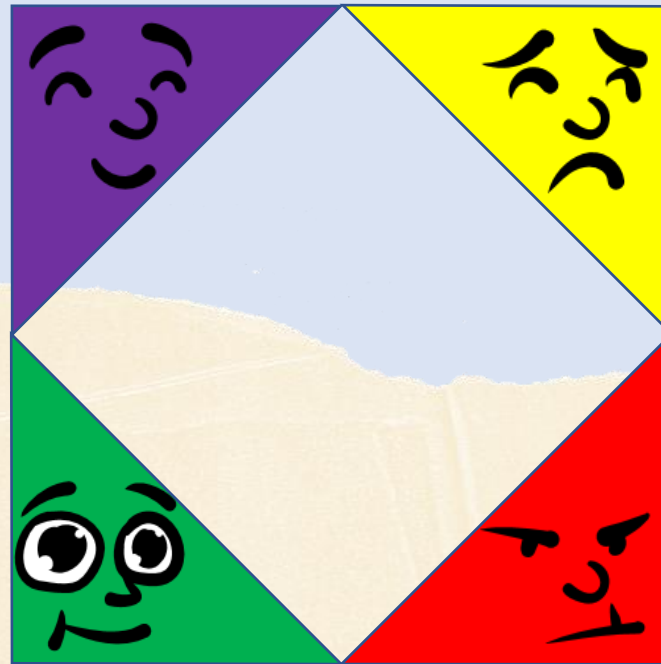
S.W.O.T. Analysis

Part 2: **Template**



STRENGTHS

Using a template can help you analyze the strengths, weaknesses, opportunities, and threats facing a product or project.



WEAKNESSES

Once you have filled out each category, make a plan for how you will address the weaknesses and threats; as well as maximizing the strengths and leveraging the opportunities you have identified.

OPPORTUNITIES

THREATS

S.W.O.T. Analysis

Part 2: **Template**



STRENGTHS

Peer Values Centered throughout all levels of organization.

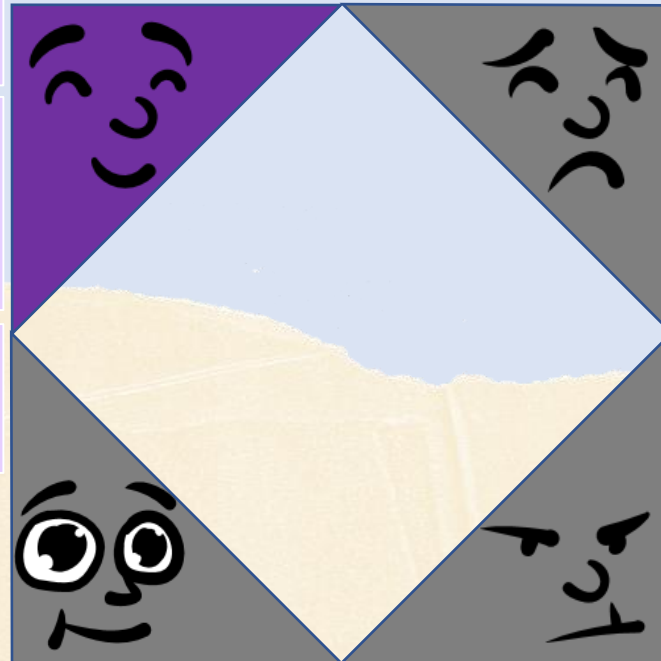
Subject matter experts and established history of effective and innovative programming.

Diverse portfolio of programming that meets the variety of SDoH needs.

WEAKNESSES

OPPORTUNITIES

THREATS



S.W.O.T. Analysis

Part 2: **Template**

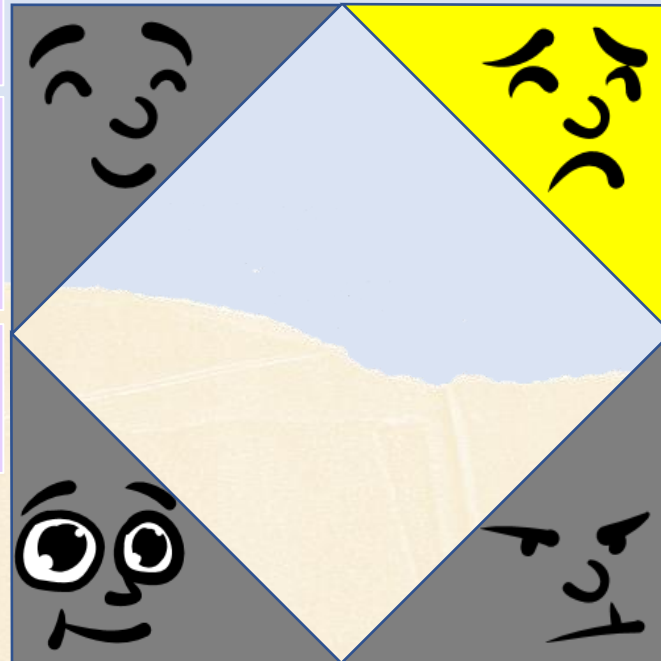


STRENGTHS

Peer Values Centered throughout all levels of organization.

Subject matter experts and established history of effective and innovative programming.

Diverse portfolio of programming that meets the variety of SDoH needs.



WEAKNESSES

Lack of consistent processes and communication leads to inefficiencies and stress.

Resource scarcity, especially regarding
-staff to participant/workload ratios
-recruitment and retention of diverse staff

Effects of silo-ing away the peer programming from the rest of the agency.

OPPORTUNITIES

THREATS

S.W.O.T. Analysis

Part 2: **Template**



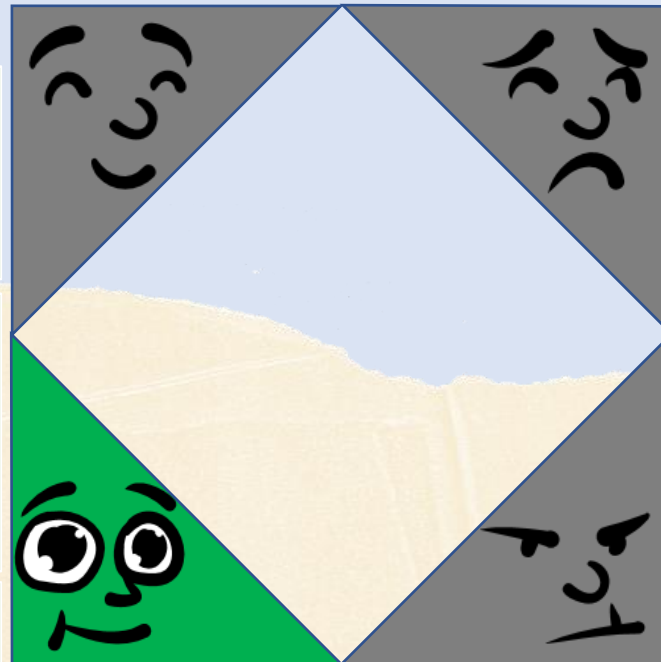
STRENGTHS

WEAKNESSES

Develop external relationships through coalition and learning collaborative building.

Capturing existing momentum through reputation, partnerships, and awareness; to build the system we want to see.

Community interest and resources funneled into peer services.



OPPORTUNITIES

THREATS

S.W.O.T. Analysis

Part 2: **Template**



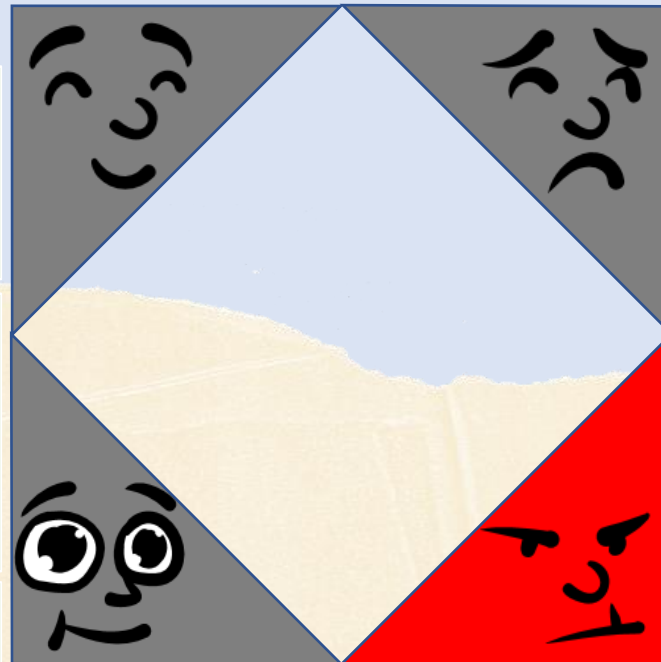
STRENGTHS

WEAKNESSES

Develop external relationships through coalition and learning collaborative building.

Capturing existing momentum through reputation, partnerships, and awareness; to build the system we want to see.

Community interest and resources funneled into peer services.



Uncertain future of funding and resources; and therefore vulnerable to recession and politics.

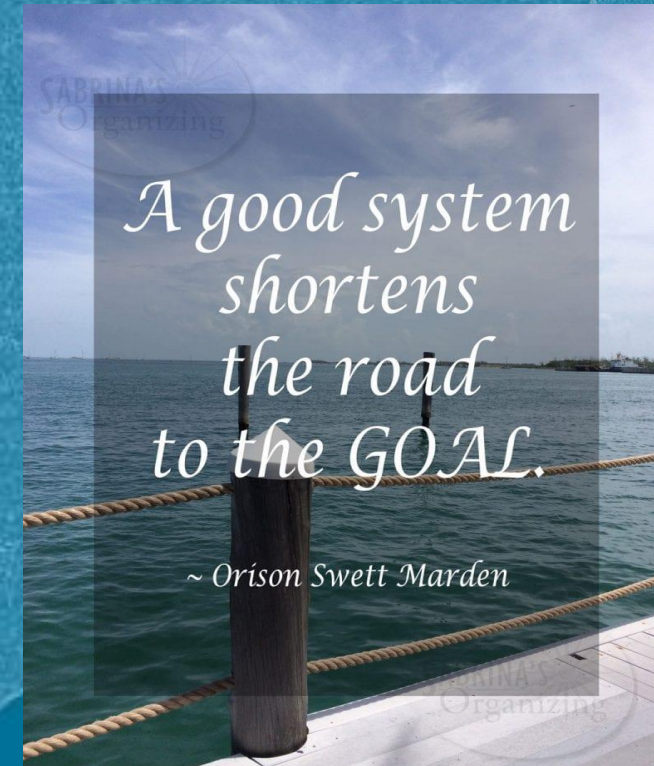
Working within a system that does not share our vision and values vulnerable to tokenization & co-optation.

OPPORTUNITIES

THREATS

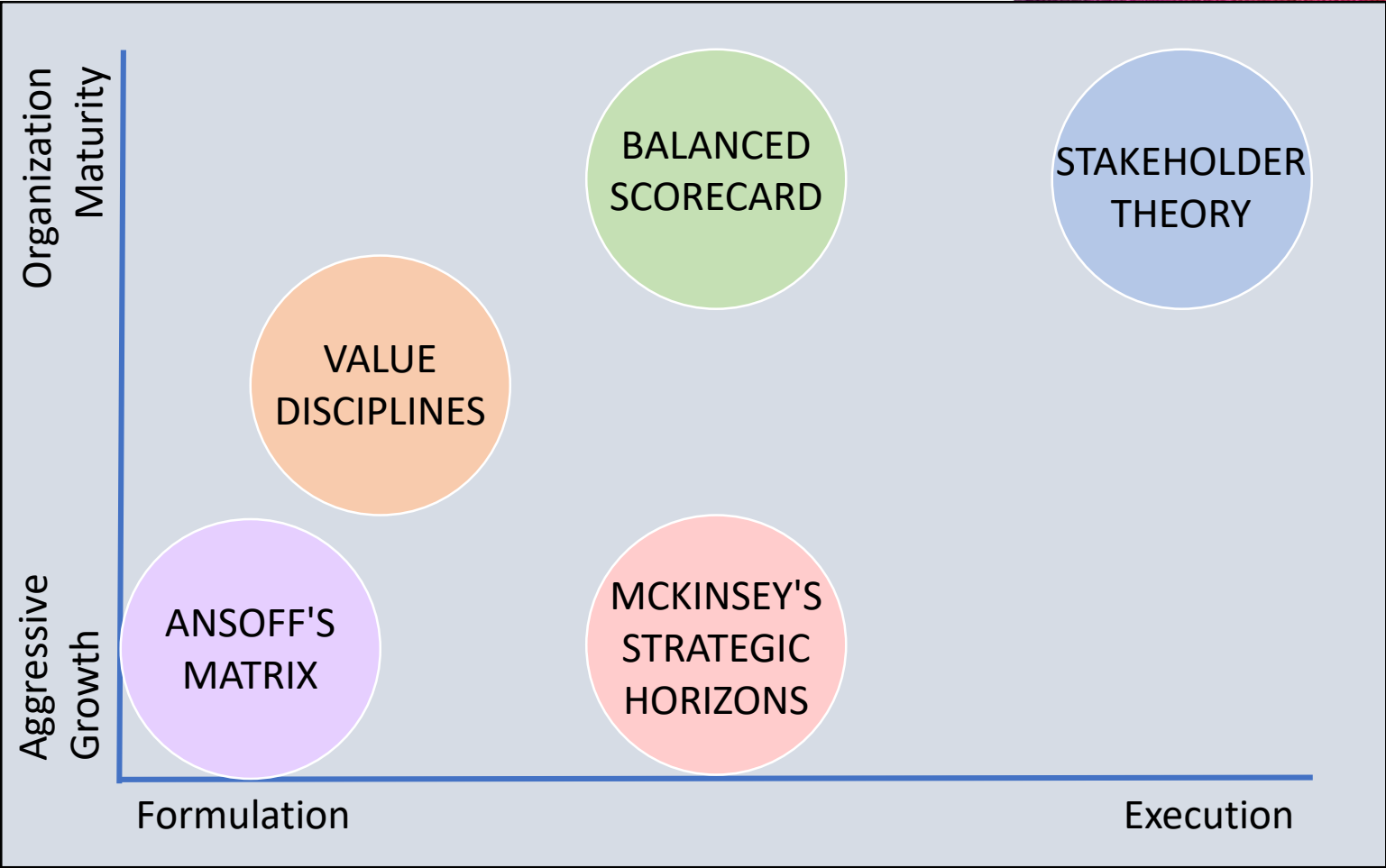
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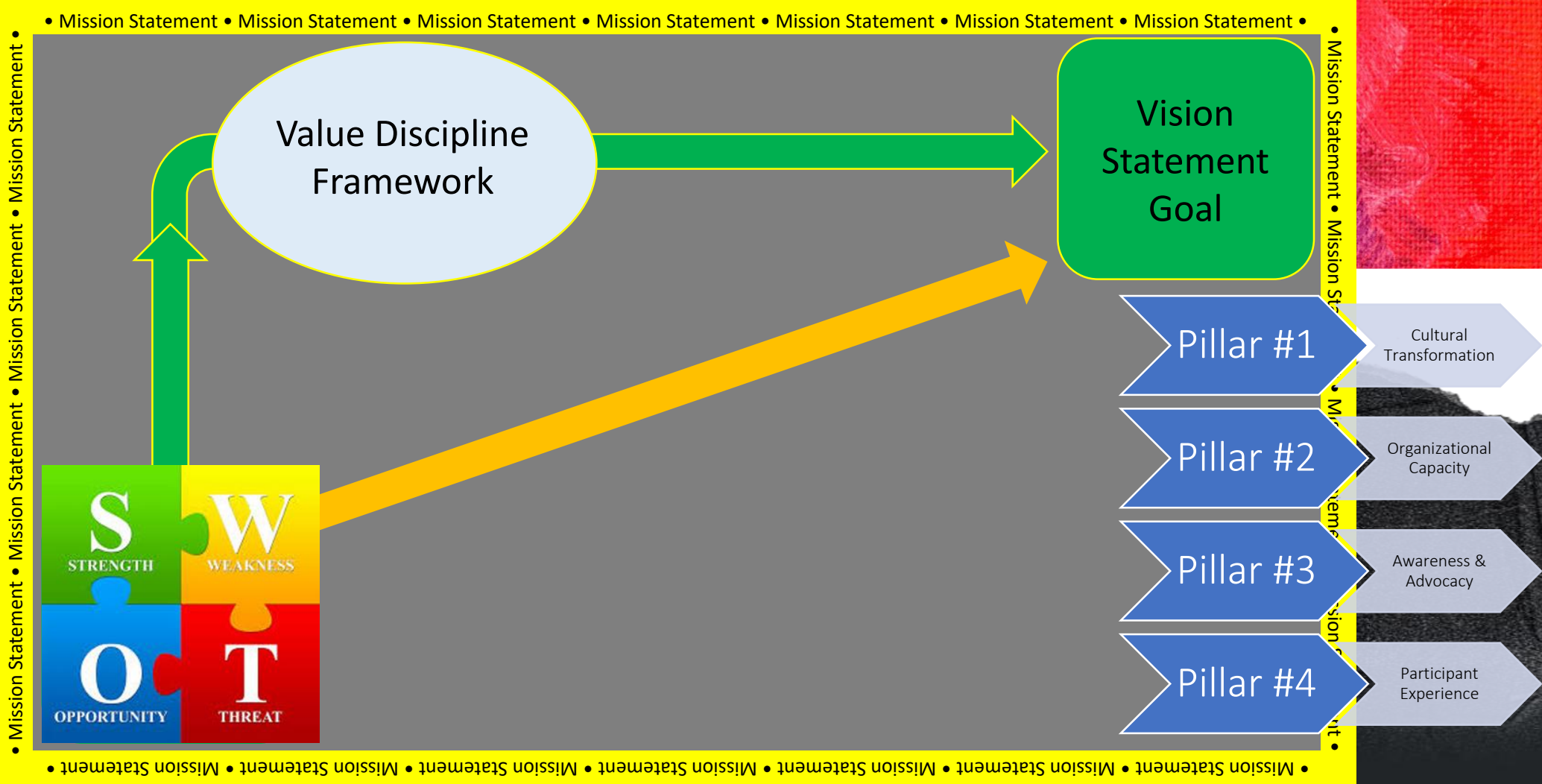
Strategic Format

Part 1: Theory



Strategic Format

Part 2: Application



Overview

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To succeed in your mission, you must have single-minded devotion to your goal.

- *Kalam*



Goals and Objectives

- **Goal:** Long-term goals are statements that describe how we plan to achieve our vision. These goals usually focus 3-5 years into the future.
- **Objectives:** Each long-term goal is broken down into one-year objectives that advance the goal. Each objective should be SMARTER:
 - S – Specific
 - M- Measurable
 - A – Achievable
 - R – Realistic
 - T – Time-based
 - E – Evaluate
 - R - Record



Goals and Objectives

Pillar: Cultural Transformation

- **Goal:** Clear and consistent understanding across New Narrative of the Peer Specialist as a role with its own unique skill set, focus, and duties
 - **Objectives:**
 - Implement the National Guidelines for Peer Specialists and Supervisors created by the National Association of Peer Supporters
 - Begin monthly cross-program co-reflection groups which focus on a core competency each month
 - Update human resources systems, such as job descriptions, policy, and performance review criteria, to ensure consistency with the National Guidelines recommendations



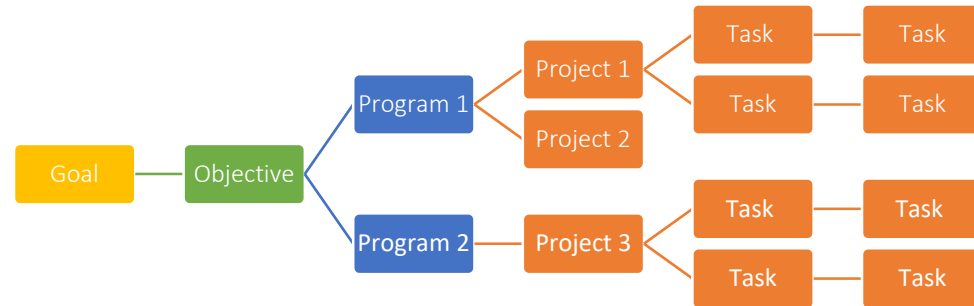
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A goal without
a plan is
just a wish.

Antoine de Saint-Exupery

Cascading the Action Plan

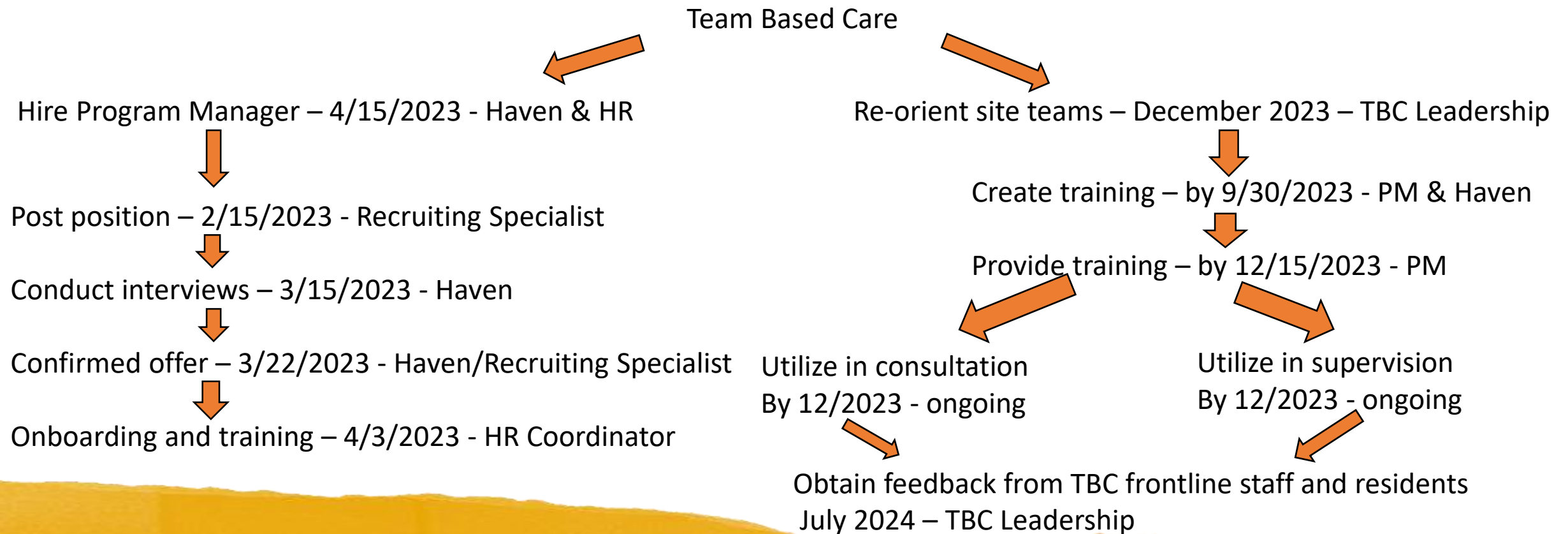


Purpose: ensures that everyone in the organization/team is working towards the same goal and has a clear understanding of what needs to be done to achieve that goal.

- Takes the overall objective and "cascades" it down to specific projects and tasks at each level of the organization
- Creates a pathway of identified, manageable steps that supports each team member in seeing how their individual contributions move the vision forward
- Allows for easier monitoring of progress and making adjustments as needed

Cascading the Action Plan


Objective: Implement the National Guidelines for Peer Specialists and Supervisors created by the National Association of Peer Supporters





Tips and Learnings

- Its ok to be self-taught
 - and the internet is full of free resources!
- Create visuals of your process and refer back to them
 - This work is abstract – visuals help ground us
- Be clear on the scope of your plan – and stay focused
 - Its easy to get off-track and into problem solving mode
- Ongoing 2-way communication and coordination throughout the organization is key for success
 - If you aren't there yet – build it into your plan!



When it comes to
achieving our goals,
our failures are nothing
more than
success in progress.

- Tanveer Naseer

Thank you for
your time and
talent

We want to hear about your vision and plans –
and find opportunities to lift one another up!



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