



RECOVERY HOUSING BEST PRACTICES

HOW TO CREATE A STRATEGIC PLAN

HELPFUL TIPS FROM THE FLETCHER GROUP

WHY IT'S IMPORTANT

Regardless of the goal, strategic planning is essential. Let's say a recovery home wants to expand its capacity to serve more residents or generate more revenue by diversifying its funding base. In either case, a strategic plan is indispensable. Why? For starters, it gives you a clear roadmap for where you want to go and how to get there. It makes sure your goals align with your overall mission. And it keeps everyone on the same page, working together as effectively as possible. Creating a detailed strategic plan can also have ancillary benefits. It can help establish, for example, a lasting framework for decision-making that will keep your organization focused, efficient, responsive, and adaptable.

But creating a strategic plan can be challenging, particularly in rural areas where resources may be limited. That's why we've made this how-to guide: to show you how to create a strategic plan that's aligned with your goals while spelling out all the resources and actions needed to achieve them.

(For more information, contact the Fletcher Group at 606-657-4662 or <https://www.fletchergroup.org/contact/>.)

A METHODOLOGY AND RESOURCE LIST

To help you
improve your
services, engage
stakeholders, and
achieve better
results

A STEP-BY-STEP PROCESS

The steps outlined below can be expanded or condensed based on your organization's abilities and resources.

1. Get Stakeholder Support

Start by getting commitment and input from important groups like board members, staff, program participants, and community supporters. Their involvement is key to a successful plan.

Even small organizations can form a Strategic Planning Committee made up of board members, key staff, and volunteers.

This group will organize the process and set a timeline that fits the organization's resources. Short timelines (1–2 months) help keep the planning process focused and manageable.

2. Define Your Purpose and Responsibilities

The Strategic Planning Committee must understand the organization's main purpose and legal responsibilities (also called mandates). This involves reviewing important documents like bylaws, contracts, and funding rules. A clear understanding of these basics sets the foundation for effective planning.



3. Identify Your Stakeholders and Their Needs

Stakeholders—such as funding sources, licensing bodies, community leaders, and service participants—are essential to the organization's success. Talk with them through meetings, calls, or surveys to understand their expectations.

Different stakeholders may have conflicting priorities, so the planning committee should focus on those with the most influence on the organization's mission.

4. Review Your Mission and Values

A clear mission is essential for guiding the organization. The committee should review the mission statement and suggest changes to the Board of Directors if needed.

It's important to ensure the organization's values are reflected throughout the planning process.

5. Assess Your Environment's Strengths, Weaknesses, Opportunities, and Threats (SWOT)

Conducting an environmental assessment helps identify strengths, weaknesses, opportunities, and threats that may influence the wellbeing of the organization.

An effective SWOT analysis (see page 9 for a sample SWOT grid) includes input from staff, board members, and volunteers. An effective strategy is to focus on areas where small changes can yield significant benefits.

6. Focus on Key Issues

The Strategic Planning committee is responsible for prioritizing key opportunities and challenges that may affect the program's mission.

To maintain a manageable planning process for a small organization, limit the number of focus areas to two or three critical opportunities.

Address the most urgent weaknesses or risks first.



7. Create an Action Plan

Action plans outline how the organization will address its key issues.

Focus your efforts on:

1. Setting one or two goals for each issue.
2. Creating cost-effective initiatives, such as community partnerships.
3. Matching tasks to the skills of staff and volunteers.

These plans should be realistic, achievable, and measurable. A sample strategic plan is provided on page 6 and an action plan worksheet can be found on page 8

8. Implement the Plan

To make the plan easy to follow, create a one-page summary or checklist. Use the checklist to track progress and assign tasks to specific people.

9. Monitor and Adjust the Plan

Regularly check the plan's progress and make adjustments as needed. Hold monthly progress meetings (in-person or online) to review achievements and address challenges.

Stay flexible to adapt to new opportunities or issues.

Don't Forget to Use the Plan!

Strategic planning gives recovery homes and other service providers a clear path to improve services and adapt to challenges. This guide simplifies the process, making it achievable for small organizations.

By assessing their environment, creating actionable plans, and monitoring progress, your organization can strengthen its programs, engage stakeholders, and better support individuals on their recovery journey.



“Strategic planning will help you fully uncover your available options, set priorities for them, and define the methods to achieve them.”

— Robert McKain

YOU'VE GOT IT!

Congratulations! You now have all the information needed to conduct a Strategic Planning Process for your small rural recovery residence or organization.

To provide you with more detailed information on strategic planning, these items are provided on the following pages:

- A simple sample strategic plan that can be adapted for your organization
- A SWOT worksheet/grid that can easily be replicated
- An action plan format that can be used to assign duties and keep track of progress.

Suggested Resources

The National Council on Nonprofits has an available guide called the “Strategic Planning for Nonprofits”.

Your community may have organizations that have already done a strategic plan that they can share. Look for the following:

Community Action Agencies that are near you can be located by doing an internet search.

Head Start Programs are widely available and can be found by using an online Head Start Center locator.



Public Health Departments - Most counties are served by either a health department within the county or a nearby district health department that serves a group of counties. Your local government can provide information on the health department that serves your county.

United Way may serve the county where you are located. Either search for United Way online or ask local organizations that label themselves as being United Way Agencies.

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Three-Year Strategic Plan for the “New Day Recovery House”

(January 2025 – December 2027)

Introduction

The New Day Recovery House’s Three-Year Strategic Plan outlines key initiatives and strategies that were developed through a two-month long strategic planning process. The plan prioritizes goals and specifies measurable objectives to be used to achieve the goals.

The planning process was led by a Strategic Planning Committee that incorporated the input of a range of stakeholders, reviewed organizational documents, and considered mandates under which New Day must operate:

Strategic Planning Committee Members:

Jane Smith, House Manager
Bill Day, Board of Directors Member
“Jill”, Resident
Sam Mills, City Manager
Joe Rogers, Master of Public Administration intern

Vision Statement

Paving the way to long-term substance use disorder recovery by providing a safe and healing home.

Goals and Strategies

A SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis was conducted by Joe Rogers, MPA Intern, with input from New Day staff, board members, and volunteers. Through this exercise, impactful changes that can enhance New Day’s service delivery and sustainability were identified.

Goal 1: Ensure Access to Recovery Housing

Strategy: Increase access to recovery housing by expanding facility capacity.

- **Objective 1A:** Secure additional space that can be used to expand New Day’s residential capacity by September 2025, ensuring that twice as many individuals are able to access the organization’s recovery housing and services.
- **Objective 1B:** Provide additional support services (e.g., job training and links to employment placement) by October 2025 to support the long-term recovery of New Day residents.

(continued next page)



Goals and Strategies, continued

Goal 2: Eliminate Stigma

Strategy: Implement a stigma reduction program focused on recovery.

- **Objective 2A:** Use sources from the Reducing Stigma, Ending Discrimination resource guide provided by the Substance Abuse and Mental Health Services Administration (SAMHSA) to inform and persuade relevant audiences starting by May 2025 and continuing quarterly thereafter.
- **Objective 2B:** Develop and implement an ongoing public awareness campaign (social, digital, and print media) by July 2025 focusing on Substance Use Disorder (SUD) and the role that recovery housing and supportive services play in achieving long-term recovery.

Goal 3: Improve Financial Stability

Strategy: Develop a diversified funding base to support and expand New Day's services.

Objective 3A: Research and apply for appropriate funding sources, including grants, donations, sponsorships, and social enterprise initiatives by July 2025 and continuing based on due dates.

Objective 3B: Develop relationships with local businesses, nonprofits, churches, civic organizations, and government agencies to secure long-term funding support by May 2025 and continuing ongoing.

Objective 3C: Organize an annual fundraising campaign to engage the community and attract New Day donors by December 2025.

Conclusion

This strategic plan provides a structured approach for the New Day Recovery House to strengthen and expand its services, engage stakeholders, and respond to stigma in its service community. Through ongoing assessment and adaptation of this strategic plan, the New Day Recovery House will continue to support individuals on their recovery journeys.

SAMPLE ACTION PLAN

GOAL: _____

DESIRED OUTCOME: _____

OBJECTIVES*	TASKS	RESPONSIBLE PARTY	START DATE	COMPLETION DATE

*Objectives should be SMART (Specific, Measurable, Attainable, Realistic, Time-Based)

SWOT ANALYSIS	
STRENGTHS	WEAKNESSES
OPPORTUNITIES	WEAKNESSES