

OPERATIONALIZING A PRIORITY

# Strategic Priority Deep Dive

*A repeatable way to take one priority from idea to action — what it means, what you'd do, what you're measuring, what's hard, and who carries it.*

Use this for any single strategic priority. Walk it top to bottom — the order matters. Get clear on what the priority means, map the actual work, decide how you'll measure it, name what's hard, and rate what it will take. By the time you reach the bottom, you'll know who carries it. Run a fresh sheet for each priority you take on.

YOUR PRIORITY

|                                                     |                                        |
|-----------------------------------------------------|----------------------------------------|
| Pillar                                              | SERVE / EDUCATE / ELEVATE — circle one |
| Strategic Priority                                  |                                        |
| Strategy / Big Bet<br><i>the 1.x you're working</i> |                                        |

STEP 1

## What Does This Mean?

Before anyone divides up the work, get on the same page about what this priority actually is. Say it in plain language — what are we building or doing, and for whom? Then draw the line: what's deliberately out of scope for now? A shared definition here saves you from three different versions of the plan later.

OUT OF SCOPE

STEP 2

Possibilities & Tactics — Year by Year

Start with the work itself. List the tactics — the concrete things you'd actually do — and name a likely owner for each as you go; ownership is far easier to feel here, while the work is fresh, than to assign cold at the end.

You can't do all of it in Year 1, and you don't have to: Year 1 is what you build, launch, or pilot (and what has to happen in the next 90 days). Year 2 is where you expand and refine. Year 3 is where you sustain and deepen.

YEAR 1 (2026) — BUILD / LAUNCH / PILOT

| TACTIC | WHO'D OWN IT? |
|--------|---------------|
|        |               |
|        |               |
|        |               |
|        |               |

Name an owner as you go — it's easier to feel here than to assign at the end.

YEAR 2 (2027) — EXPAND / REFINE

YEAR 3 (2028) — SUSTAIN / DEEPEN

STEP 3

## Metrics to Track

Now that you can see the work, decide how you'll know it's working. Name up to three metrics. For each one, write what actually counts — the definition matters as much as the number, since a “served” person and an “educated” person are not the same thing. Then set a range instead of a single pass/fail target:

**Base** is the floor you'll hold (often grant-tied), **Target** is the real goal, **Stretch** is what you'd celebrate if conditions line up.

| Metric | Definition — What Counts? | Base | Target | Stretch |
|--------|---------------------------|------|--------|---------|
|        |                           |      |        |         |
|        |                           |      |        |         |
|        |                           |      |        |         |

Which of these are tied to a grant?

STEP 4

## Risks & Constraints

What makes this hard? Name it plainly — capacity, funding, timing, the constraint you already see coming. This isn't pessimism; it's how you plan for the real version instead of the ideal one.

The risks you name now are the ones you can plan around.

STEP 5

## Complexity Alignment

Rate what this actually takes to pull off, so you can plan realistically and ask for what you need. Circle a level for each dimension and add a line on what's driving it. Use the same yardstick across the room (the key below).

- Low** — we can do this with what we have, minimal impacts
- Med** — doable, but it'll take planning and some new capacity
- High** — a real lift; needs new resources, heavy coordination, or things outside our control

| DIMENSION                                                                                      | LEVEL (CIRCLE)   | WHAT'S DRIVING THE RATING |
|------------------------------------------------------------------------------------------------|------------------|---------------------------|
| <b>Cross-program</b> — how many programs are involved?<br>New collaboration?                   | Low / Med / High |                           |
| <b>Resources</b> — staffing, people, knowledge, skill set. Do we have who and what this needs? | Low / Med / High |                           |
| <b>Technology &amp; Infrastructure</b> — tools, Salesforce, what makes it trackable?           | Low / Med / High |                           |
| <b>Environmental</b> — funding, economy, policy, federal compliance                            | Low / Med / High |                           |

THE BOLD ASK

*What do you need from the CEO, COO, or Board to make this real?*

## CROSS-PROGRAM

### Who Carries This

Most priorities touch more than one program. Go department by department and name how each one contributes or partners on this priority — a service it delivers, data it owns, a relationship it brings. If a department doesn't have a natural role here, write N/A; no one has to force a fit. The point is to see the whole picture before you name a single owner.

| DEPARTMENT                           | HOW IT CONTRIBUTES OR PARTNERS<br>(OR N/A) |
|--------------------------------------|--------------------------------------------|
| Intake                               |                                            |
| Caregiver Support (CSP)              |                                            |
| Elder Financial Safety Center (EFSC) |                                            |
| Long-Term Care Ombudsman (LTCOP)     |                                            |
| Guardianship                         |                                            |
| Foster Grandparents (FGP)            |                                            |
| RSVP                                 |                                            |
| Senior Companions (SCP)              |                                            |
| Marketing & Communications           |                                            |
| Development                          |                                            |
| Finance                              |                                            |
| Corporate & Foundation Relations     |                                            |

ACCOUNTABILITY

Name the Owner

You've been circling ownership the whole way down. Now lock it. MOCHA keeps “everyone's responsible” from becoming “no one's accountable.”

There is exactly one Owner — the single person driving this forward. Everyone else supports.

|                                                  |  |
|--------------------------------------------------|--|
| M    Manager — keeps it moving, clears blockers  |  |
| O    Owner — the one person driving this forward |  |
| C    Consulted — heard before the call is made   |  |
| H    Helpers — hands doing the work              |  |
| A    Approver — final sign-off                   |  |