

Checklist for The Next Chapter Planners

Completed by: _____
Name Organization

Community: _____

Planning Items	Comments
<p>1. Guiding Principles, Values and Goals</p> <p>a. ____ Looks to the future as a productive, positive time.</p> <p>b. ____ Focus is asset and strength-based.</p> <p>c. ____ Uses language that is acceptable to the target audience.</p> <p>d. ____ Demonstrates understanding of and addresses existing perceptions and barriers.</p>	
<p>2. Vision and Outcomes</p> <p>a. ____ All partners can articulate the shared vision.</p> <p>b. ____ All partners know what success looks like.</p> <p>c. ____ All partners can articulate intended impact.</p> <p>d. ____ Partners agree on measurable outcomes.</p>	
<p>3. Target Audience</p> <p>a. ____ Target Audience is clear.</p> <p>b. ____ Specific age range, other characteristics: _____</p> <p>c. ____ Specific geographic location: _____</p> <p>d. ____ Socio-economic demographics: _____</p> <p>e. ____ Psycho-social characteristics: _____</p> <p>f. ____ Percent who will be current user/customers/clients: _____</p> <p>g. ____ Percent who will be beyond current users/customers/clients: _____</p>	
<p>4. Older Adult Involvement</p> <p>a. ____ Current users, customers and clients</p> <p>b. ____ Beyond current users, customers and clients</p> <p>c. ____ Advisory roles</p> <p>d. ____ Leadership roles ____paid ____unpaid ____stipend ____other</p> <p>e. ____ Functional roles ____paid ____unpaid ____stipend ____other</p> <p>f. ____ Other roles _____</p>	
<p>5. Advisory Body</p> <p>a. ____ Will reflect the target audience.</p> <p>b. ____ Will be inclusive.</p> <p>c. ____ Will reach beyond the usual players.</p> <p>d. ____ Will play key role in all major aspects of Next Chapter design.</p> <p>e. ____ Has awareness/commitment to goals, guiding principles & values.</p>	
<p>6. Key Partners</p> <p>a. ____ Will reach beyond "the usual suspects."</p> <p>b. ____ Have awareness/commitment to goals, guiding principles and values.</p> <p>c. ____ Understand clearly their roles and specific contributions to the effort.</p> <p>d. ____ Share responsibility for the successful outcome of the project.</p> <p>e. ____ Part of a shared decision-making team for planning and implementation.</p> <p>f. ____ Included in regular, detailed communication about the project.</p>	
<p>7. Staff</p> <p>a. ____ Who: _____</p> <p>b. ____ Scope of Work: _____</p> <p>c. ____ Full time ____ Part time ____ Project consultants _____</p> <p>d. ____ Awareness and commitment to goals, principles and values</p> <p>e. ____ Reconfigured roles and responsibilities of current staff</p> <p>f. ____ New staff: _____</p>	

Planning Items	Comments
8. Volunteers (unpaid, stipended, other benefits) a. ___ Who: _____ b. ___ Recruitment plan c. ___ Awareness and commitment to goals, principles and values	
9. Core Components a. ___ Life Planning – to be provided: ___ In house ___ By partner ___ Contracted b. ___ Meaningful Engagement through Workt and Service – through: ___ Existing opportunities ___ New opportunities to be developed c. ___ Continued Learning for New Directions – to be provided: ___ New careers: ___ In house ___ Partner ___ Contracted ___ Enrichment: ___ In house ___ Partner ___ Contracted d. ___ Connections to Peers and the Community	
10. Cross-cutting Component a. ___ Assistance with Information and Resource Navigation	
11. Optional Elements a. ___ Caregiving b. ___ Employment c. ___ Financial Planning d. ___ Leadership Development e. ___ Relationships f. ___ Spirituality g. ___ Technology and Information Literary h. ___ Wellness	
12. Programming a. ___ Multiple options, menu of options: _____ _____ b. ___ New programs – going beyond what you know best, stretching c. ___ Partners for more options d. ___ Significantly more than current offerings	
13. Beyond Next Chapter Programming a. ___ Will direct adults to resources <u>outside</u> Next Chapter structure	
14. Identity, Marketing and Public Relations a. ___ Will have a plan in place that reflects research on potential users b. ___ Will have a plan for general community awareness	
15. Space a. ___ Dedicated b. ___ Comfortable c. ___ Appealing	
16. Access a. ___ Hours: ___ User friendly (nights & weekends) ___ Based on user preferences b. ___ Transportation: ___ Public ___ Parking ___ Other c. ___ Language: ___ Multi-lingual staff ___ Multi-lingual program options ___ Multi-lingual materials	
17. Budget a. ___ Planning period budget b. ___ Implementation budget ___ Lead organizational commitment ___ Partner commitment(s) ___ Other sources of funds	

Other Comments: