Strategic Planning Part I: Behind the Scenes with Strategic Planning

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Rural Health Innovations (RHI), LLC, is a subsidiary of the National Rural Health Resource Center (The Center), a non-profit organization. Together, RHI and The Center are the nation’s leading technical assistance and knowledge centers in rural health. In partnership with The Center, RHI connects rural health organizations with innovations that enhance the health of rural communities.
Webinar Objectives

• Understand the role of strategic planning in setting the stage for effective change
• Identify how to take advantage of the dynamic and iterative strategic planning cycle to progressively move toward your vision
• Explore effective strategic plan approaches and methods
Webinar Agenda

1. Change
2. Strategic planning cycle is like a slinky
3. Effective planning suggestions
Change

- Project is creating change
- Stakeholders stay engaged
- Planning has a role in engaging stakeholders
- Change is uncomfortable
BSC Planning Methodology

Mission
Why we exist

Values
What’s important to us

Vision
What we want to be

Strategy
Our game plan

Communicate
Translate our strategy to stakeholders

Operationalize
Execute initiatives that move toward the vision

Monitor and Adapt
Measure what we want to improve

Adapted from Kaplan & Norton, 2002
Mission, Values and Vision

Network Organization
Aiming for a Shared Vision

Current State → Strategic Planning Cycle → Vision
What is the Value of Strategy?
What is the Strategic Planning Cycle?

- **Analyze & Plan**
- **Document & Communicate**
- **Execute the Plan**
- **Monitor & Adapt**
Stepping Towards the Vision
Network Purpose and Shared Vision

This section provides a high-level overview of the network’s:

- History
- Members
- Mission
- Shared Vision
- Primary Grant Goals
Analyze the Environment

This section reviews:

• Characteristics of the Network
• Internal Environment
• External Environment
• Strengths and Levers
• Weaknesses and Blocks
Force Field Analysis: Implementing HIT

Forces

- Technological advances
- Workforce demands for technology
- Consumer demand
- Quality breakdowns
- High health care costs
- Congressional mandates

Obstacles

- Low awareness of HIT scope and complexity
- Physician and staff resistance
- HIE confusion
- Shortage of HIT technical expertise
- Initial and on-going costs
- Silo thinking
Tipping Point
Awareness of Surroundings
Strategic Objectives

- Identifies the 2-3 year strategic objectives
- Aligned with shared vision
- SMART
Strategies Define the Route and Provide a Path
Where are we at?

Strategic Planning Cycle

- Analyze & Plan
- Document & Communicate
- Execute the Plan
- Monitor & Adapt
Document and Communicate

• Communicating the components of the strategic plan
• Plan for communication throughout the entire Strategic Planning Cycle
• Plan includes:
  ◦ What
  ◦ Audience
  ◦ How
  ◦ When
  ◦ Who
## Communication Plan

This section details how the strategic objectives and initiatives are communicated throughout the network and partner organizations.

Consider using a visual to illustrate the communication plan. This section should be no more than two pages. Add rows as needed.

<table>
<thead>
<tr>
<th>What is being Communicated?</th>
<th>Audience of Communication</th>
<th>Mode of Delivering Information</th>
<th>Frequency of Delivering Information</th>
<th>Person Responsible for Communication</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mission / Vision</td>
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<tr>
<td>Strategic Objectives</td>
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Strategy Map Communication

Business and Development
As financial stakeholders, how do we intend to meet the goals and objectives in the network’s Mission Statement?

Members and Partners
As customers of the network services, what do we want, need or expect?

Internal Processes
As members of the network’s staff, what do we need to do to meet the needs of the patients and healthcare community?

Learning and Growth
As an organization, what type of culture, skills, training, and technology are we going to develop to support our processes?

Develop Revenue
Generating Services for Network Sustainability

Support Member Awareness of Health Care Changes

Nurture Member Relationships

Promote Network Visibility

Increase Board Engagement

Develop Network Leadership Capacity
Dashboard

1. Pursuit of Medicaid Reimbursement for Tele-Dental Services

   \[\text{Diagram showing progress levels}\]

   Plans for Monitoring and Review
   - Scheduled meetings with State Department of Health Liaison (attended 4/10/15 strategic planning meeting) to discuss status of billing status
   - Medicaid generated revenue will be tallied and tracked with dental software
   - Assess the potential revenue if tele-dental services reimbursed by Medicaid
   - Work with billing team to draft dental billing policy Number of Medicaid billing codes established
   - Assess potential revenue if tele-dental services are not reimbursed

2. Complete Expansion of Service into Dental Office and Mobil Clinic

   \[\text{Diagram showing progress levels}\]

   Plans for Monitoring and Review
   - Weekly meetings held with telehealth staff, all telehealth activities, including tele-dentistry, are discussed
   - Tele-dentistry services successfully provided
   - Number of tele-dental services documented in dental software (daily) and reports reviewed

3. Recruitment of Part or Full-Time Dentist to Expand Capacity of Treatment

   \[\text{Diagram showing progress levels}\]

   Plans for Monitoring and Review
   - Human Resources (HR) staff monitors applicant database for submissions
   - If recruitment is unsuccessful, HR staff will reassess recruitment efforts
Where are we at?

**Strategic Planning Cycle**
- Analyze & Plan
- Monitor & Adapt
- Document & Communicate
- Execute the Plan
Operationalizing with Key Initiatives

• Shows the alignment
  ◦ Strategic Objectives
  ◦ Outcomes
  ◦ Key Initiatives

• Take the steps

• Use the chosen framework to illustrate
Executing the Plan
### Goal #2: The network, within three years will develop a sustainable, community-based job-driven program for health professionals in North Central Iowa.

<table>
<thead>
<tr>
<th>Strategic Objective</th>
<th>Output/Outcome Measures (Top 2)</th>
<th>Key Initiatives</th>
</tr>
</thead>
</table>
| A. The Network will have completed a strategic plan including expansion of program. | 1. Complete Network Strategic Plan utilizing the Community Needs Assessment.  
2. By March 1st 2016 the final Program Evaluation Plan will be completed and submitted. | • Gather background materials for planning meeting.  
• Hold a strategic planning retreat.  
• Communicate planning meeting outcomes to partners/community.  
• Sync evaluation plan with strategic plan. |
| B. The Network will have a complete sustainability and recruitment plan in place. | 3. Retention and job placement measured at 3, 5 & 10 years.  
4. Conduct a deep dive and review program evaluation plan to create sustainability plan.  
5. Conduct a deep dive and review program evaluation plan to create sustainability plan.  
6. One on One student-instructor meetings to understand student and program needs. | • Thorough members needs assessment.  
• Determine appropriate data to collect.  
• Determine value propositions.  
• Create an ongoing monitoring and adjusting process. |
Now where are we at?

Strategic Planning Cycle

Document & Communicate

Execute the Plan

Monitor & Adapt

Analyze & Plan
Monitoring and Adapting

• How progress of the strategic objectives will be:
  ◦ Monitored
  ◦ Adapted
• Monitor Quarterly
• Adjust Annually
## Evaluation Keeps the Plan Going

### GOAL 1: Improved health outcomes for a specific population

<table>
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<tr>
<th>Program Objective</th>
<th>What</th>
<th>When</th>
<th>Who is responsible for gathering the data</th>
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<tr>
<td><strong>C) Create a Coordinated Care Process for 1 chronic disease population</strong></td>
<td><strong>Measure Description of an Output or Outcome</strong></td>
<td><strong>Target</strong></td>
<td><strong>Definition of Measure</strong></td>
</tr>
<tr>
<td>Output: A-1) % of people receiving coordinated care within chronic disease population</td>
<td>15%</td>
<td>Out of the total disease population % of those receiving care coordination service within the month</td>
<td>Network members report</td>
</tr>
<tr>
<td>Outcome: A-1) % health measure above county benchmark for chronic disease</td>
<td>5% higher than benchmark</td>
<td>Health measure at end of program year compared to most recently published annual County benchmark</td>
<td>Network members report</td>
</tr>
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</table>
Fitting the Plans Together

Strategic Planning Cycle

- Document & Communicate
- Execute the Plan
- Monitor & Adapt
- Analyze & Plan
TIP: Facilitation Skills are Needed

We are Better Together
TIP: Know your Audience

Internal Readers

External Readers
TIP: Think Like a Business
TIP: Get on a Schedule to Monitor and Adapt

Strategic Planning Cycle

- Analyze & Plan
- Document & Communicate
- Execute the plan
- Monitor & Adapt
TIP: There are Many Right Answers

Operationalize with Work Plan (Key colored numbers inserted to chart)

**Inputs**
- Missions-driven collaboration (facial, staff, providers, partners, seniors)
- Philanthropic support (fundraising, grant writing)
- Culturally appropriate, evidence-based, innovative services
- Health professions training
- Family-centered facility

**Activities**
- Network Board
- Staff family medical center staff, ABCs for rural health's staff, MCP staff
- Less-developed Council
- Leadership
- NRHS Rural Network Development
- Grant funding
- Healthcare Consensus
- Evaluations

**Outputs**
- Family Voice Structure developed
- Scope of services developed
- Coordinated care provided
- Quality care provided
- Business structure developed
- Strategic partners recruited
- Revenue maximized

**Outputs**
- Phase 1: Discovery and needs assessment
  - Assemble collaborative and gather input on Network structure
  - Conduct interviews and observations with staff to assess existing services counseling practices
  - Gather staff perceptions of customer service of benefits counseling
  - Gather customer perceptions of customer services of benefits counseling
  - Develop and design of MCP tool (on-going)
  - Develop recommendations for workflow changes
  - Remove inaccurate perceptions
  - Share project findings
  - Introduce MOPs
  - Finalize video conference plan

**Outcome**
- Improved communication between health centers
- Greater integration into health benefits counseling network
- More accurately identifying overpayment
- Reduced gaps in overpayment
- Media capacity for health benefits counseling
- Improved integrated benefits counseling
- Appropriate technology tool developed for medical practices
- Sustained family-centered and integrated services and systems

**Objective 1:** The SafetyNet Network is sustainable and active beyond the grant period
**Objective 2:** Patient access and retention of healthcare coverage is increased
**Objective 3:** Advanced health benefits counseling with technology supports increased effectiveness, efficiency, and customer service of current programming
Toolkits to Help

Strategic Plan & Evaluation Plan
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