Strategic Planning Part I: Behind the Scenes with Strategic Planning

Kap Wilkes
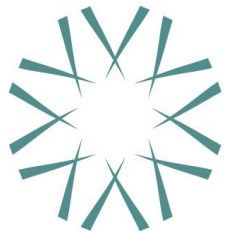
Director of Program Development

Debra Laine

Program Specialist II

August 24, 2017

Rural Health Innovations' Purpose

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

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Webinar Agenda

1. Change

2. Strategic planning cycle is like a slinky

3. Effective planning suggestions

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Change

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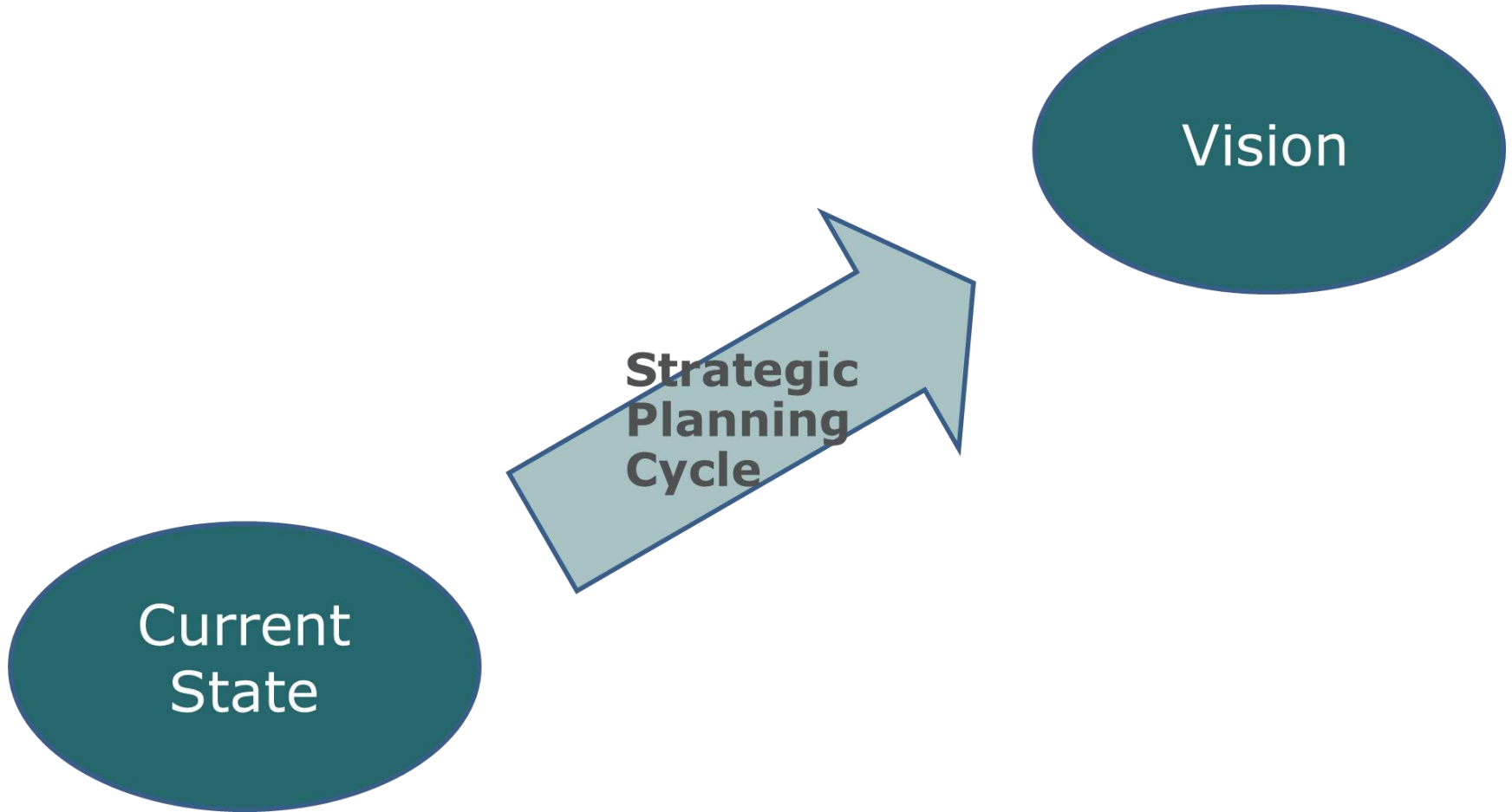- Planning has a role in engaging stakeholders
- Change is uncomfortable

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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

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Network Organization

Aiming for a Shared Vision

Vision

Strategic Planning Cycle

Current State

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What is the Value of Strategy?

What is the Strategic Planning Cycle?

Document & Communicate

Execute the plan

Monitor & Adapt

Analyze & Plan

Strategic Planning Cycle

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Stepping Towards the Vision
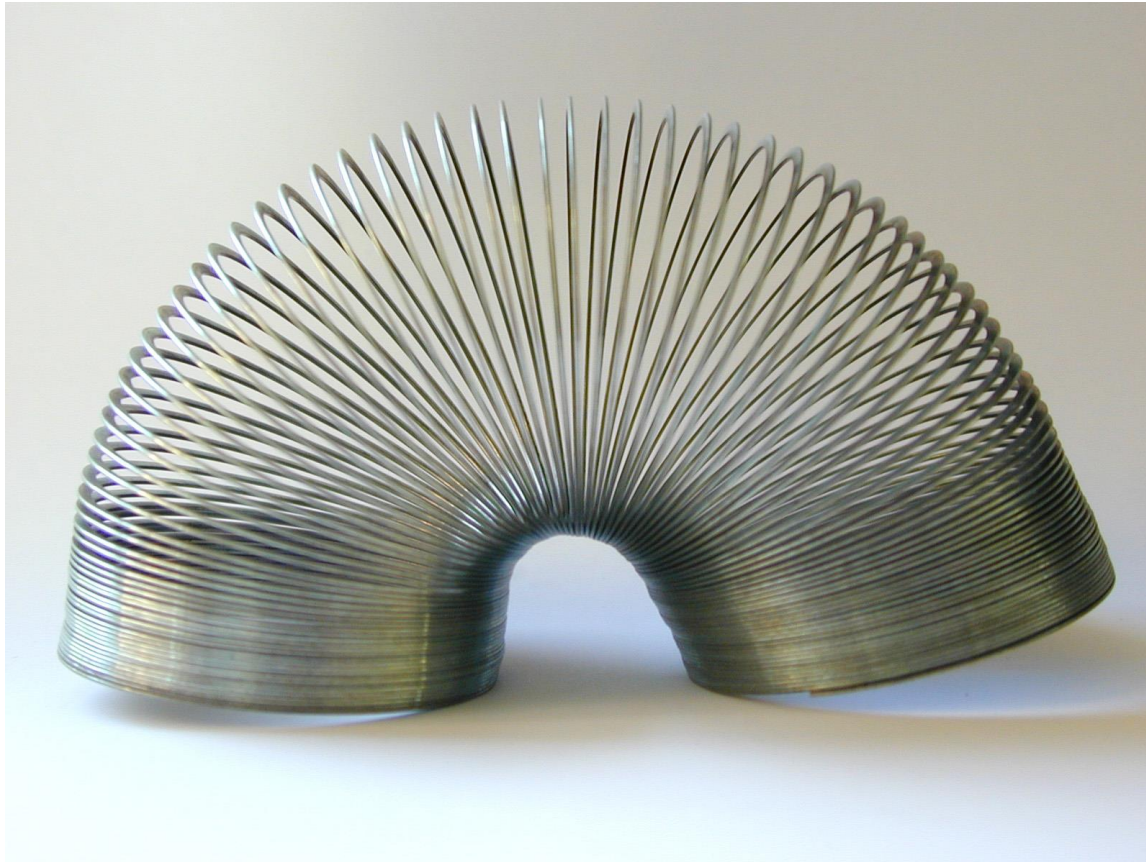
Network Purpose and Shared Vision

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

- History
- Members
- Mission
- Shared Vision
- Primary Grant Goals

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Analyze the Environment

This section reviews:

- Characteristics of the Network

- Internal Environment

- External Environment

- Strengths and Levers

- Weaknesses and Blocks

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Force Field Analysis: Implementing HIT

Forces →

← **Obstacles**

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

- 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

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Tipping Point
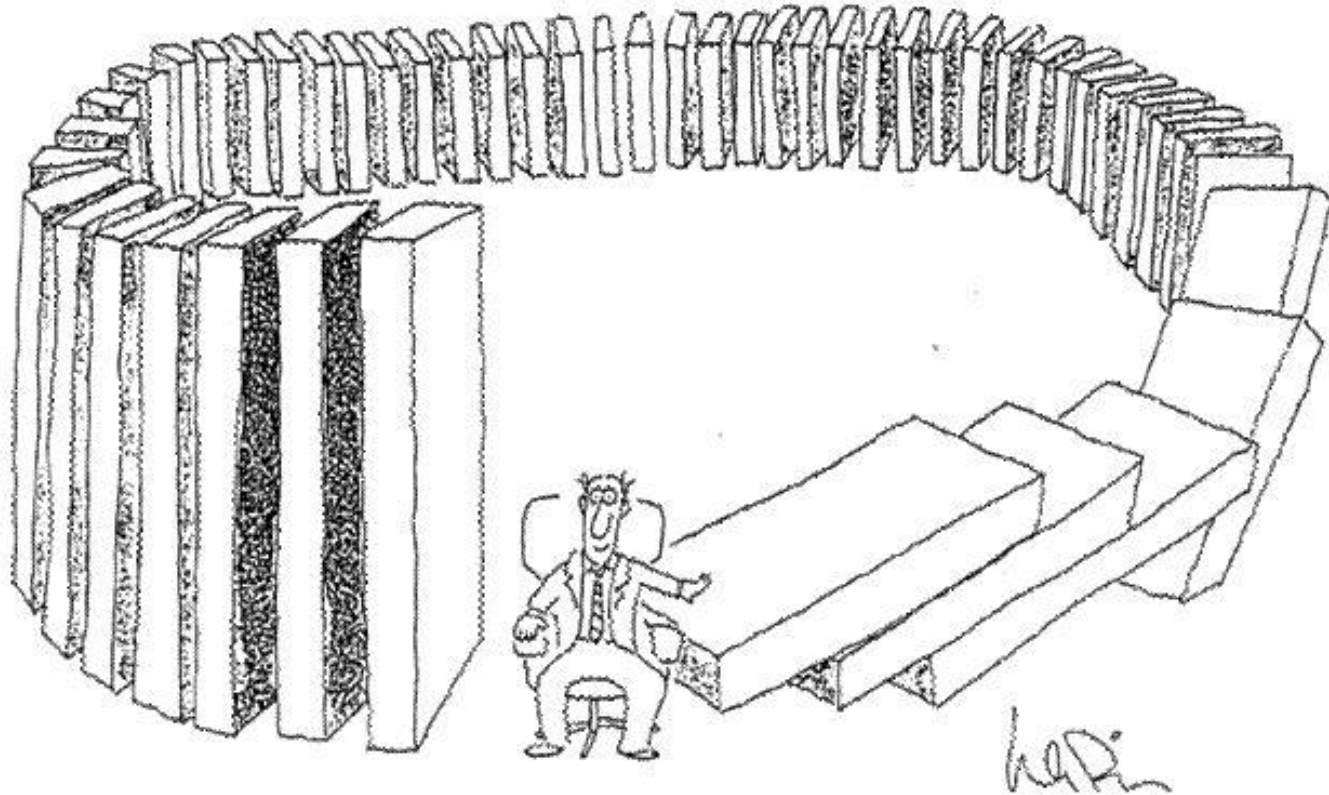
Strategic Objectives

- Identifies the 2-3 year strategic objectives
- Aligned with shared vision
- SMART

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Strategies Define the Route and Provide a Path

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Document & Communicate

Strategic Planning Cycle

Analyze & Plan

Execute the Plan

Monitor & Adapt

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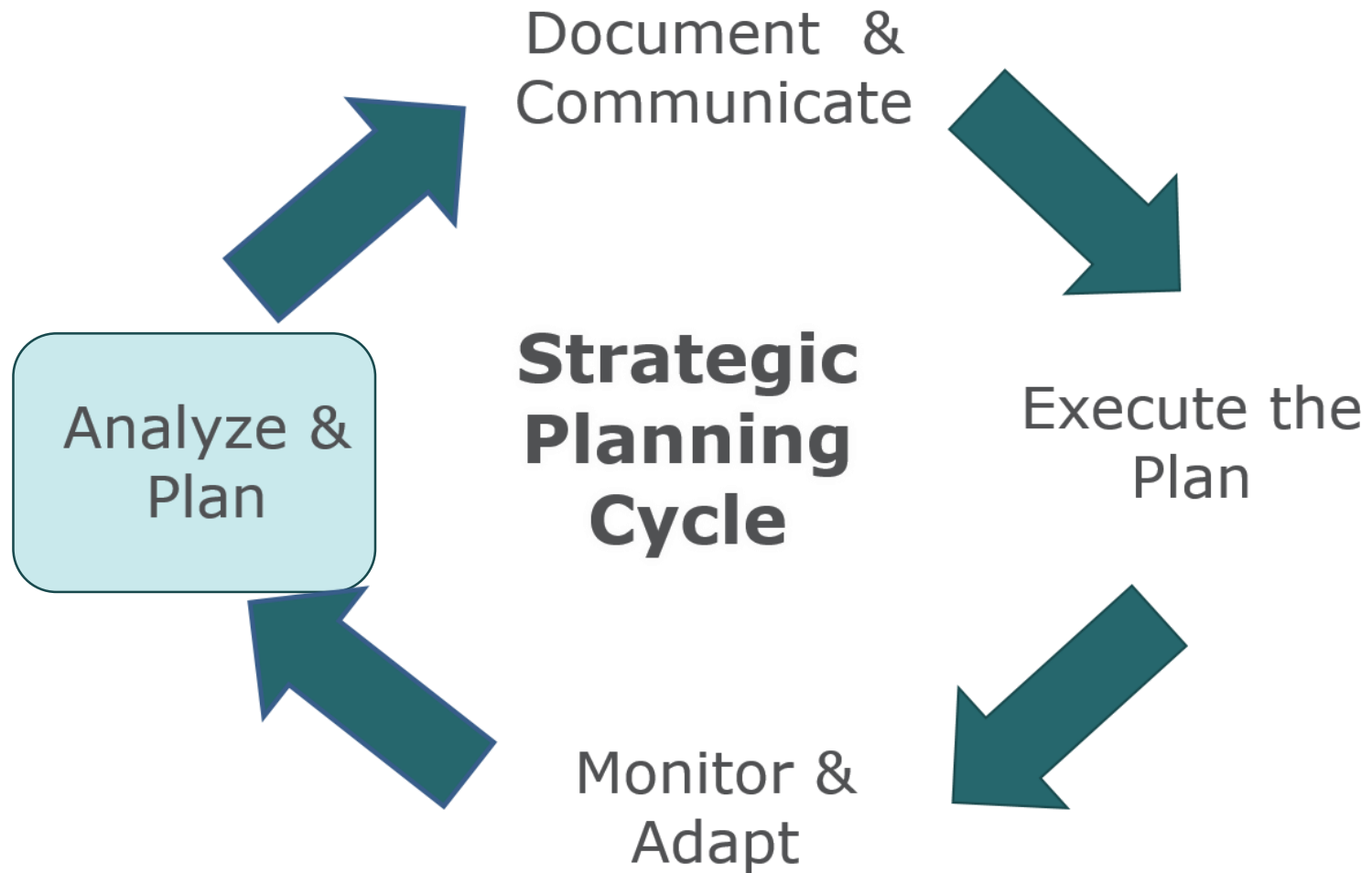
Document and Communicate

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

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Template: Communication Plan

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.

What is being Communicated?	Audience of Communication	Mode of Delivering Information	Frequency of Delivering Information	Person Responsible for Communication
Mission / Vision				
Strategic Objectives				

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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?

Develop Revenue Generating Services for Network Sustainability

Members and Partners

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

Support Member Awareness of Health Care Changes

Nurture Member Relationships

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?

Promote Network Visibility

Increase Board Engagement

Learning and Growth

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

Develop Network Leadership Capacity

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Dashboard

1. Pursuit of Medicaid Reimbursement for Tele-Dental Services
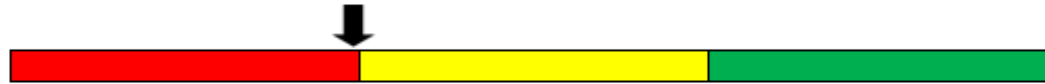
    Plans for Monitoring and Review

    - 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

    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

    Plans for Monitoring and Review

    - Human Resources (HR) staff monitors applicant database for submissions
    - If recruitment is unsuccessful, HR staff will reassess recruitment efforts

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Document & Communicate

Analyze & Plan

Strategic Planning Cycle

Execute the Plan

Monitor & Adapt

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Operationalizing with Key Initiatives

- Shows the alignment
  - Strategic Objectives
  - Outcomes
  - Key Initiatives
- Take the steps
- Use the chosen framework to illustrate

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Operations Move the Dial

Goal #2: The network, within three years will develop a sustainable, community-based job-driven program for health professionals in North Central Iowa.		
Strategic Objective	**Output/Outcome Measures (Top 2)**	**Key Initiatives**
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.

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Now where are we at?

Document & Communicate

Execute the Plan

Monitor & Adapt

Analyze & Plan

Strategic Planning Cycle

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Monitoring and Adapting

- How progress of the strategic objectives will be:
  - Monitored
  - Adapted
- Monitor Quarterly
- Adjust Annually

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Evaluation Keeps the Plan Going

GOAL 1: Improved health outcomes for a specific population

Program Objective	What				When	Who
	Measure Description of an Output or Outcome	Target	Definition of Measure	Method of Collecting Data	Frequency of data collection	Who is responsible for gathering the data
C) Create a Coordinated Care Process for 1 chronic disease population	Output: A-1) % of people receiving coordinated care within chronic disease population	15%	Out of the total disease population % of those receiving care coordination service within the month	Network members report	Monthly	Project Manager
	Outcome: A-1) % health measure above county benchmark for chronic disease	5% higher than benchmark	Health measure at end of program year compared to most recently published annual County benchmark	Network members report	Annually	Project Manager

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Fitting the Plans Together

Document & Communicate

Execute the Plan

Monitor & Adapt

Analyze & Plan

Strategic Planning Cycle

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TIP: Facilitation Skills are Needed
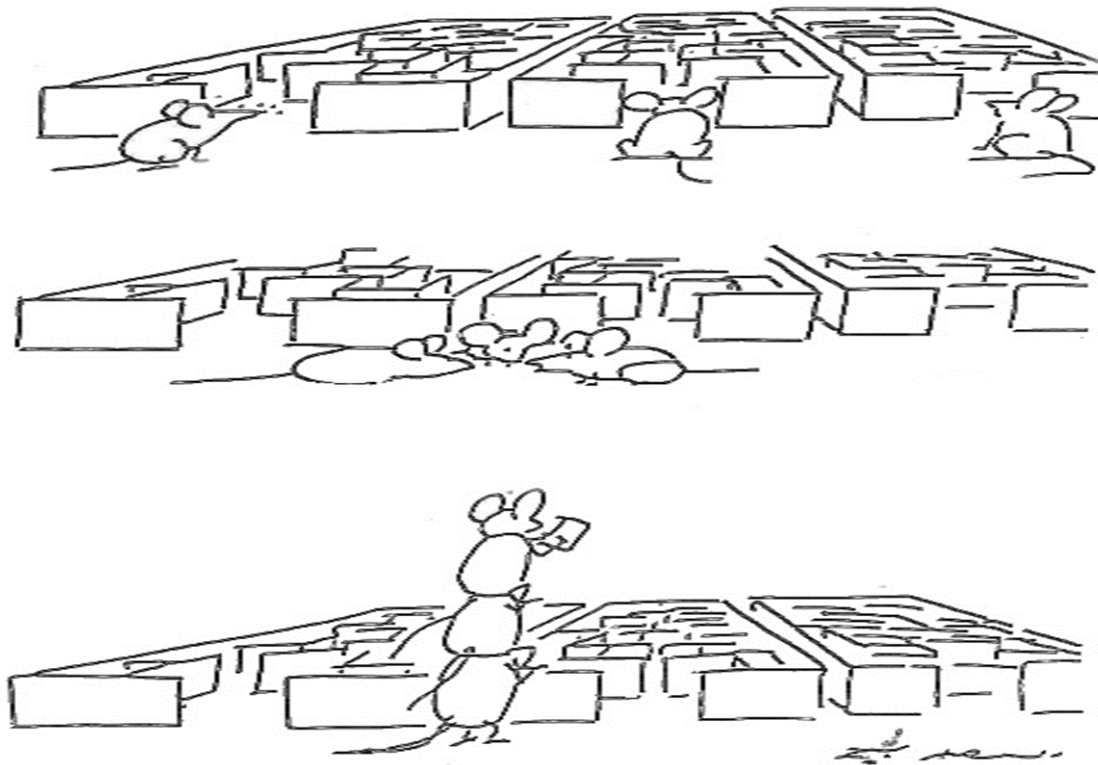
We are Better Together

TIP: Know your Audience

Internal Readers

External Readers

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TIP: Think Like a Business

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TIP: Get on a Schedule to Monitor and Adapt

TIP: There are Many Right Answers

Operationalize Work Plan

Toolkits to Help

Strategic Plan & Evaluation Plan
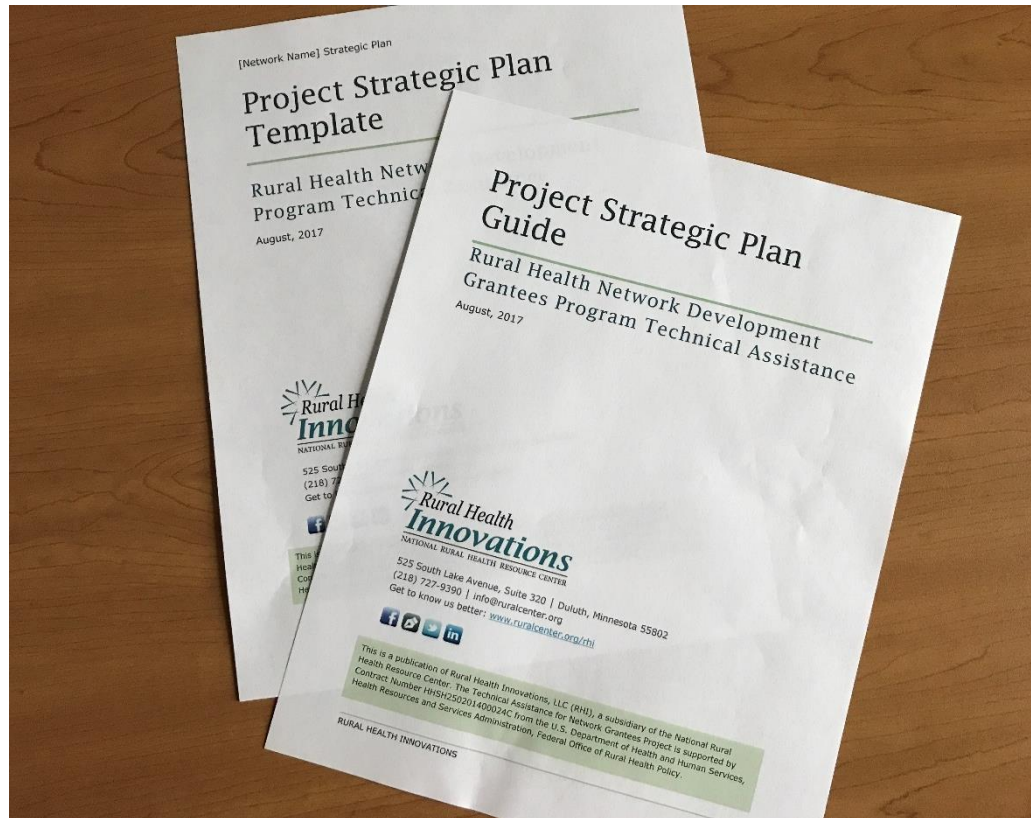
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