

Strategic Planning Part I: Behind the Scenes with Strategic Planning

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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



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



Adapted from Kaplan & Norton, 2002



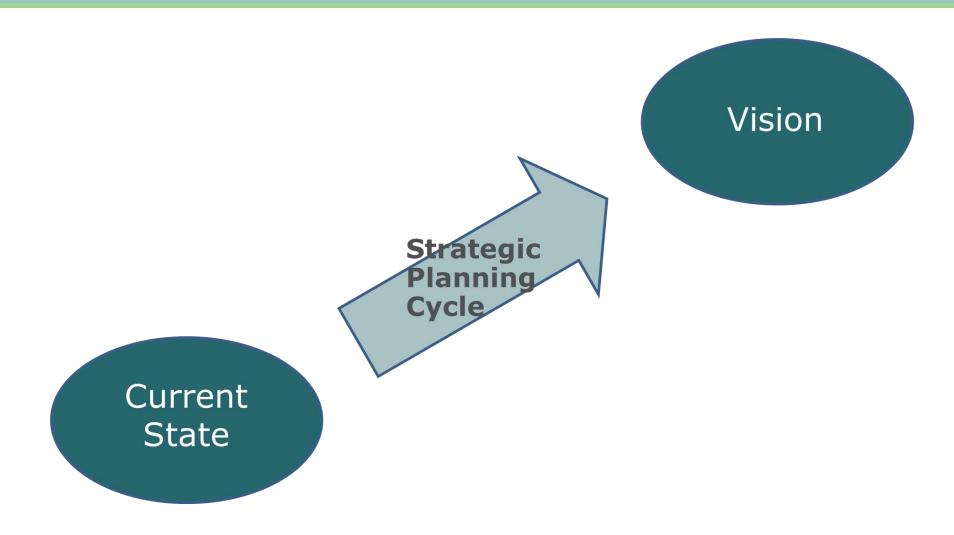
Mission, Values and Vision

Network Organization





Aiming for a Shared Vision





What is the Value of Strategy?





What is the Strategic Planning Cycle?





Stepping Towards the Vision

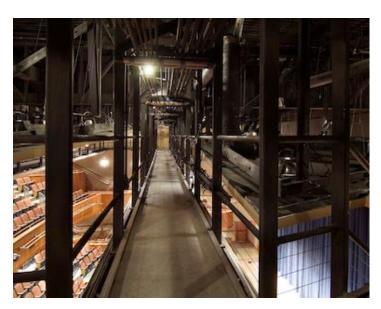




Network Purpose and Shared Vision

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

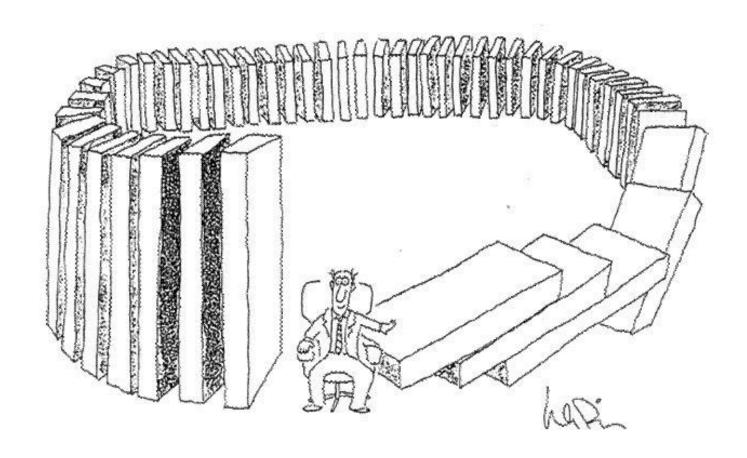


Tipping Point





Awareness of Surroundings





Strategic Objectives

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

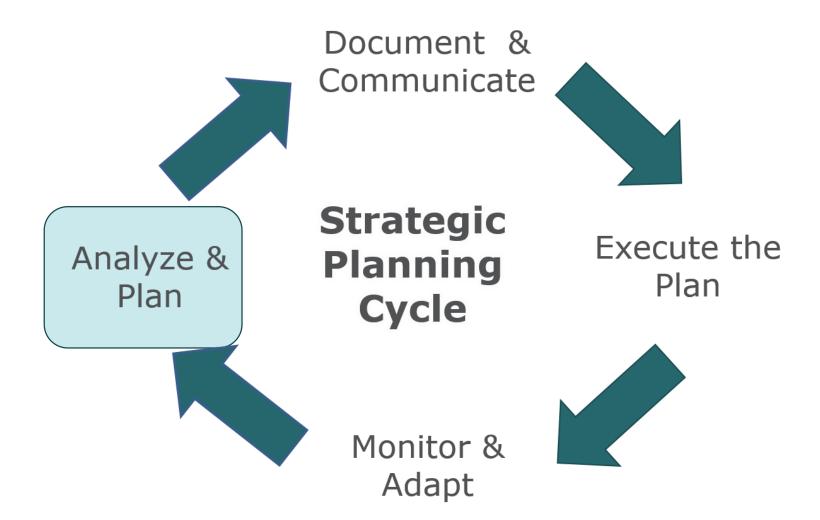




Strategies Define the Route and Provide a Path



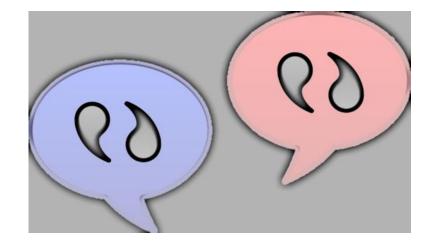
Where are we at?





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





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				



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



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

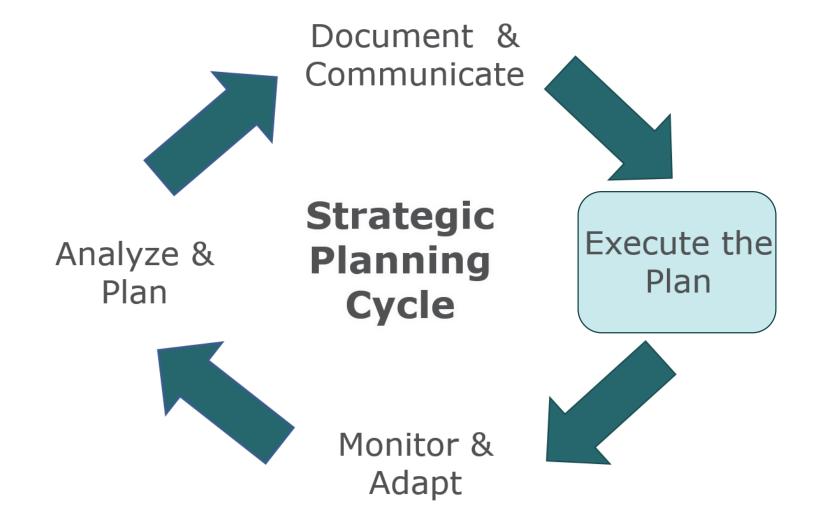


Plans for Monitoring and Review

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



Where are we at?





Operationalizing with Key Initiatives

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





Executing the Plan





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	 Complete Network Strategic Plan utilizing the Community Needs Assessment. 	 Gather background materials for planning meeting. Hold a strategic planning retreat. Communicate planning meeting 				
including expansion of program.	By March 1st 2016 the final Program Evaluation Plan will be completed and submitted.	outcomes to partners/community. Sync evaluation plan with strategic plan.				
	 Retention and job placement measured at 3, 5 & 10 years. 	Thorough members needs assessment. Determine appropriate data to collect.				
B. The Network will have a complete sustainability	 Conduct a deep dive and review program evaluation plan to create sustainability plan. 	Determine value propositions. Create an ongoing monitoring and adjusting process.				
and recruitment plan in place.	Conduct a deep dive and review program evaluation plan to create sustainability plan.					
	 One on One student-instructor meetings to understand student and program needs. 					



Now where are we at?



Document & Communicate



Analyze & Plan

Strategic Planning Cycle

Execute the Plan



Monitor & Adapt





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

Program	What				When	Who
Objective	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

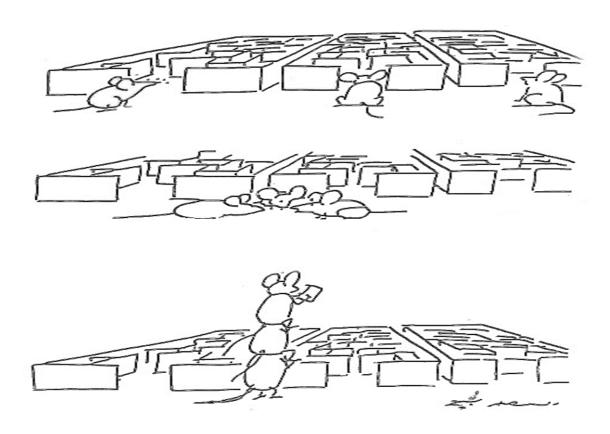


Fitting the Plans Together





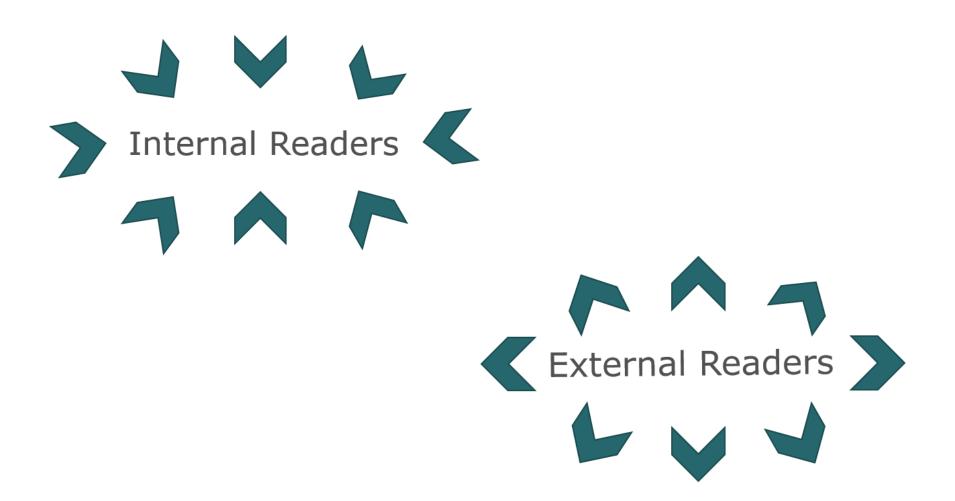
TIP: Facilitation Skills are Needed



We are Better Together



TIP: Know your Audience



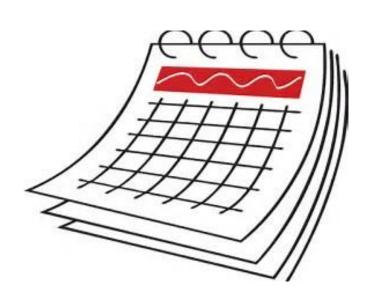


TIP: Think Like a Business





TIP: Get on a Schedule to Monitor and Adapt







TIP: There are Many Right Answers

Operationalize Work Plan

Activities 1. Develop charter; recruit/orient/train

2. Conduct needs assessment/gap analysis standardize target population/services; develop policy/procedure manual; develop capacity to meet needs

3. Add Care Coordinators to medical home teams; use mobile technology/telehealt

4. Develop shared systems/EHRs; use common HIE; study development of single bill

5. Select performance measures: develop capacity to collect/analyze/repo rt data; develop Ouality Committee study research partnership opportunities

Health professions Family-centered facility

Inputs

Mission-driven

collaboration

(families, staff,

providers,

members)

Philanthropic

support (fundraising, grant

writing)

Culturally

innovative

Outputs 1. Charter developed ined by Y1

> 2. Needs assessment/gap analysis conducted by Y1; target population/services standardized by Y1; policy/procedure nanual developed by Y2; capacity to meet needs developed by Y3

3. Care Coordinators added to medical home teams by Y2; mobile technology/telehealth used by Y2

4. Shared access to appointment scheduling systems/EHRs developed by Y2; common HIE used by Y3; development of single bill studied by Y2

5. Performance measures selected by Y1; capacity to collect analyze repor t data developed by Y2; Quality Committee

developed by Y2; research partnership opportunities studied by Y1

organization identified by Y1; one identified by Y1; one

6. Review CLA 6. CLA findings and by Y1; business business plan

7. Identify organizations; add members to Board succession planning

8. Negotiate contracts with managed care 1. Family Voices

developed 2. Scope of services developed

3. Coordinated care provided 4. Continuity of

care provided 5. Quality care provided 6. Business

structure developed 7. Strategic

maximized

Structure

Family-centered and integrated services

Impact

Family-centered and integrated systems

Sustained family-centered and integrated services and systems

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

	Inputs					Outcomes		
		Activities			Short	Medium	Long	
•	Network Board Staff time needical renedical renedical center staff, ABC for Rural Health's staff, MCP staff, MCP staff, MCP staff Health's Leadership Council Hospital leadership HRSA Rural Network Developme nt grant funding Healthcare Consumers Evaluators	Phase 1. Discovery and needs assessment Assemble collaborators and gather input on Network structure 1 Conduct interviews and observations with staff to assess existing benefits counseling practices 2, 3 Gather staff perceptions of customer services of benefits counseling 3 Gather customer perceptions of customer services of benefits counseling 3 Survey staff to assess existing benefits counseling 3 Survey staff to assess existing benefits counseling and knowledge/awareness 3 Identify privacy requirements for sharing data 2 Conduct uncompensated care audit 2 Lidentify security, proprietary, and technical issues for integrating MCP software info existing admin data systems 2 Collect baseline information and data regarding existing CCPPC network. 1	Phase 2: Develop products Develop new Safety/Web, Network Structure (schedule, 1 peose, attendees) 2 peose and content with stakeholder input (and based on results of staff survey) 3 peose and design of MCP tool (ongoing) 3 peovelop recommendations for workflow changes 1 Introduce case meetings 3 1 Introduce client services meetings 3 5 Finalize tideo conferencing plan 1	Phus 3: Implementation and Testing/Invaluation Conduct Assessment of Safetywek Network Collaborative Capacity 1 Present trainings and educational material 3 Integrate and deploy MCP software 2, 3 Interviews and observations with staff to assess practices and workflow changes 3 Survey staff to assess practices and knowledge/awareness changes 3 Gather staff and patient perceptions of customer services related to benefits counseling 3 Assess SafetyWeb, Network implementation and success 1, 2, 3 Collect and analyze patient data on coverage access across span of project 2, 3 Review efficiency of benefits counseling practices 2, 3 Review uncompensated care audit 2, 3	Phase 4: Product improvement and refinement, information dissemination - Continuous improvement to product based on feedback from partners 1, 2, 3 - Share project and process updates with stakeholders 1, 2, 3 - Share project findings 1, 2, 3 - Introduce MCP more widely 1, 2, 3	Improved communication between health centers 1 1 Greater integrated health benefits counseling network 1 Pts more accurately screened for coverage 2, 3 Greater staff capacity for health benefits counseling work 2, 3 Appropriate technology tool developed for medical centers' needs 2, 3 Software deployed and integrated 2, 3 Project evaluated 1, 2, 3	- Medical centers generate less communit y care 2, 3 and access to care 2, 3 Reduced gaps in coverage 2, 3 Pts empowere d to self-manage coverage transitions 2, 3	- Economic health disparities reduced 2, 3 3 - Fewer unmet health care needs in Polk County 2, 3 - Improved community health 1, 2, 3 - Replication of project in other sites 1, 3 - MCP commercialized and more widely deployed 1, 2, 3

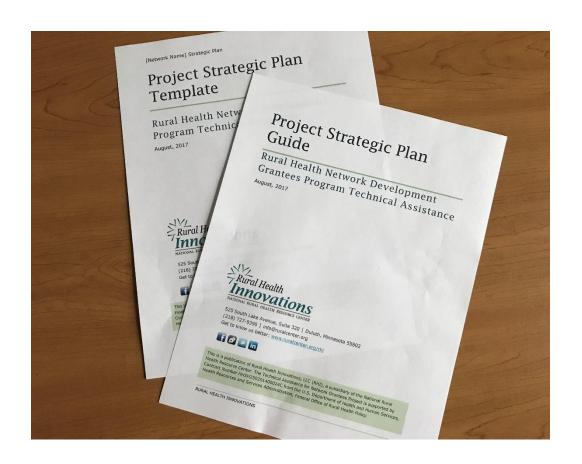
Objective 1:

The Safetyweb Network is sustainable and active beyond the grant period Strategic Objective 2: Patient access and retention of health care coverage is increased Strategic Objective 3: Advanced health benefits counseling with technology supports increases effectiveness, efficiency, and customer service of current programming



Toolkits to Help

Strategic Plan & Evaluation Plan







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