Strategic Planning Guide

Network Development Technical Assistance

February 12, 2015



600 East Superior Street, Suite 404 │ Duluth, Minnesota 55802
218-727-9390 │ kwilkes@ruralcenter.org
[www.ruralcenter.org/rhi/network-ta](http://www.ruralcenter.org/rhi/network-ta)

This is a publication of [Rural Health Innovations, LLC](https://www.ruralcenter.org/rhi/network-ta) (RHI), a subsidiary of the [National Rural Health Resource Center](https://www.ruralcenter.org/). The Technical Assistance for Network Grantees Project is supported by Contract Number **HHSH250201400024C** from the U.S. Department of Health and Human Services, Health Resources and Services Administration, Federal Office of Rural Health Policy.

# Table of Contents

[How to use this Strategic Planning Guide 1](#_Toc411420100)

[Key Tips to Developing and Writing a Strategic Plan 2](#_Toc411420101)

[Strategic Planning Agenda 5](#_Toc411420102)

[Strategic Planning Event Presentation 6](#_Toc411420103)

[Network Vision Check-In and Commitment Worksheet 7](#_Toc411420104)

[Environmental Scan CheckList 8](#_Toc411420105)

[Environmental Scan Analysis Worksheet 9](#_Toc411420106)

[Environmental Scan Analysis Documentation 10](#_Toc411420107)

[Strategic Objective Worksheet 11](#_Toc411420108)

[Strategic Objective Documentation 12](#_Toc411420109)

[Alignment of Objectives with Vision and Mission Worksheet 13](#_Toc411420110)

[Strategic Objective Map 14](#_Toc411420111)

[Strategic Objective Logic Model 15](#_Toc411420112)

[Strategic Planning Resources 16](#_Toc411420113)

# How to use this Strategic Planning Guide

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 enhances the health of rural communities by providing products and services with a focus on excellence and innovation. RHI is providing technical assistance (TA) to the Network Development grantees through a contract with the Federal Office of Rural Health Policy.

**Purpose of this Guide**

This Program Strategic Plan Guide is designed to provide support to Network Development grantees to create an effective and participative strategic planning event with the result of having board consensus and approval of strategic objectives to guide the network over the coming 2-3 years.

* This sample guide illustrates one approach for strategic planning based on the balanced scorecard methodology.
* Other strategic planning approaches, such as, Logic Model, Business Model Generation, etc. utilize the same components and conversations however, language will be aligned with the approach.

The associated Strategic Planning Template and educational webinar: *Program Strategic Planning and Tools* isrecorded and posted on the *Aim for Impact and Sustainability* network resource webpage and as resources in The Center’s Resource Library.

# Key Tips to Developing and Writing a Strategic Plan

1. Recommended components of a strategic plan:
	1. Program Description and Shared Vision
	2. Strategic Planning Approach and Design
	3. Environmental Scan and Analysis
	4. Strategic Objectives
	5. Communication Plan
	6. Operationalize the Plan with Work Plan
	7. Monitoring and Adjusting with Evaluation Plan
2. Use an external facilitator so that as a network leader you have the opportunity to actively participate in the planning. We would also recommend using this template to set the expectations for participation and as a checklist for your planning design.
3. The aim of a strategic plan is to provide a path or direction for effective change that will move an organization from today’s environment toward its vision. *See Strategic Planning Presentation Template as a resource for opening a participative strategic planning event with network stakeholders.*
4. The work of strategic planning provides a means for building understanding and consensus of stakeholders on the vision of the organization and the objectives that will drive the change. *See* [*Vision Check-In and Commitment*](#_Network_Vision_Check-In) *and* [*Strategic Objectives Worksheet*](#_Strategic_Objective_Worksheet) *for details of one approach.*
5. Embrace and follow a planning cycle.

Strategic
Planning
Cycle

Document & Communicate

Operationalize the Plan

Analyze & Plan

Monitor & Adjust

1. Incorporate a collaborative approach; consider carefully the stakeholders that can help bring information and understanding of the environment and can help strategically consider changes for the program or organization to move from the current reality toward the vision. The list of participants will vary with each organization*. Contact your Network TA Team to help you design your organization’s strategic planning participants.*

*Collaboration: We are Better Together*. This is a great metaphor for showing how stakeholders working together to solve complex issues can be effective; and for these mice rewarding as well!

1. Spend deliberate time reviewing and revising, if needed, the vision; it is critical that the vision is shared and supported by all stakeholders in the early steps of the planning process. *See* [*Worksheet for Vision Check-In and Commitment*](#_Network_Vision_Check-In) *for details of one approach.*
2. Spend due time on environmental scanning and analysis and include all stakeholders; it will make for better objectives if all planners are working with the same basic information. *See* [*Environmental Checklist,*](#_Environmental_Scan_CheckList)[*Worksheet for Environmental Scan and Analysis*](#_Environmental_Scan_Analysis)*, and* [*Environmental Scan Documentation*](#_Environmental_Scan_Analysis_1) *for details of one approach.*
3. Use a systems approach and consider all aspects of the organization while planning*. Contact your Network TA Team for additional resources related to systems thinking and the Baldrige Performance Excellence Framework.*
4. Use a diagram for stakeholders to easily see how Strategic Objectives are aligned with the organization vision. *See* [*Strategic Objective Map*](#_Strategic_Objective_Map) *for details of one approach.*
5. Before finalizing objectives for network board approval, re-work the strategic objectives until they are SMART and ready to be incorporated into the Evaluation Plan.

Specific, Measureable, Attainable, Realistic, Timely

1. Whatever framework is being used for developing the Strategic objectives, be consistent with the language. *See* [*Worksheet for Strategic Objectives*](#_Strategic_Objective_Worksheet) *and* [*Strategic Objective Documentation*](#_Strategic_Objective_Documentation) *for details of one approach*.

# Strategic Planning Agenda

This sample agenda illustrates a strategic planning event designed for 6-8 hours of presentation, discussion and planning.

[Rural Health Network]

Strategic Planning Event

[Date and Time]

[Location City, State]

**9:30 – 10:30 am**

Welcome, introductions, and agenda

*Network Director*

*Planning Facilitator*

Strategic Planning Overview and Methodology (presentation)

Vision Discussion and Commitment (discussion)

**10:30 – 12:30 pm**

Strategic Planning – Part 1

Environmental Data (presentation)

Data Analysis and Prioritize Levers and Blocks (workshop)

**12:30 – 1:00 pm**

LUNCH

**1:00 – 4:30 pm**

Strategic Planning – Part 2

Strategic Objectives Planning (workshop)

Check-In on Strategic Objective Alignment (discussion)

Strategic Planning – Part 3

Consider Next Steps

* Communication
* Operationalize
* Evaluation

Planning Event Closing

# Strategic Planning Event Presentation

Use this outline of a strategic planning introduction to engage the planning participants and set the context for the planning event, discuss and commit to network vision, present planning methodology and process, and walk through environmental scan. The result of this presentation will be a group of planners ready to engage in strategic thinking.

**Strategic Planning Presentation Outline**

Strategic Planning Introduction

Agenda

Ground Rules

Planning Methodology

Network Mission

Network Values

Aim for the Vision

Network Vision Check-In and Commitment Discussion

Begin with Analyze and Plan

Environmental Scan: Factors Impacting Rural Health Care

National perspective and discussion

Regional and state/county perspective and discussion

Network Update

Members

Governance

Network Services and Value

Financial Status and Current Financial Forecast

Network Program or Initiative Update

Secondary Data Analysis of Network or Member Organizations

Demographics

Health Factors

Network Member Input

Network Strengths and Gaps

Member Needs and Network Opportunities

Review Planning Process

Levers and Blocks Analysis Workshop

Strategic Objectives Workshop

# Network Vision Check-In and Commitment Worksheet

This facilitation worksheet can be used to design the vision check-in and commitment discussion as one of first components of the strategic planning event. Often this discussion is embedded within the strategic planning methodology presentation.

|  |  |
| --- | --- |
| **Rational Objective**: gaining agreement and commitment for the network vision as a critical component to creating meaning strategic objectives | **Experiential Objective**: have the group gain understanding and comfort of the network vision |
| Timing and Audience: 10-15 minutes. Network strategic planning participants, for example, network administration/leadership, network board members, other member organization leadership, community members, partner organization leadership, etc. |
| **Opening:** “Our Network vision … read through… is one that has already been approved by the governing board. In this time of planning and careful consideration and due to the importance of having a vision that we all agree to aim for during the planning and over the course of implementing our plans in the coming 2-3 years; let’s spend about 10-15 minutes talking about what this vision means for our network and to us.” |
| **Focused Conversation:*** What specific word in this vision catches your attention?
* What about this vision resonates with you? How does it hold your attention?
* How does this vision describe what we want to become as a network in this region and for our members?
* What might be the impact be on your communities as [Rural Health Network] strives to become what is stated here?
* Is this vision one we are all comfortable using as a beacon for our strategic planning?
	+ If not: what can we adjust to make it right for us today?
 |
| Do not proceed with planning until all participants are in consensus that the vision is worthy as a target for strategic planning. o make sure all participants are ready to move forward with the vision for strategic planning: use a method of gaining commitment with the vision – thumbs-up (agree), flat (can live with), or Thumbs-down (can’t live with it and need additional discussion)Note: if the vision is close but the discussion identifies that there are needed revisions and input; consider getting a group consensus that it is close enough for planning and that a vision review will take place in the near future. Set a timeline and ask an individual to take the lead on next steps |

# Environmental Scan CheckList

The following information is a checklist of environmental scan information that is helpful preparation for rural health network strategic planning. It is important to gather this information at least one month prior to the planning event so that there is time to analyze the data and prepare presentation materials. The materials are categorized by components that include aspects of the whole organization, such as, staff learning and organization culture, internal processes, customers and partners, financial, and programmatic progress.

|  |  |
| --- | --- |
| **Requested Environmental Scan Data** | **NOTES:** |
| * Organization mission, values, and vision
* Current or most recent strategic plan
* Most recent board summary
* List of board members, including: Name, job title, employer and length of service
* Business plan
 |  |
| **Business Development**  |  |
| * Summary of financial environment and primary revenue streams
* Schedule of membership dues/subscription
* Key financial indicators, such as months cash on hand
* Financial forecast 2-3 years
 | *
 |
| **Customers and Partners** |  |
| * List of partner organizations and brief description of collaboration history
* List of local and regional competitors and description of competitive services
* Most recent market analysis (website and social media)
* Member needs assessment results or collaboration assessment results
* Customer satisfaction survey results
 | *
 |
| **Internal Process** |  |
| * List of services
* Communication plan tracking
* Summary of Quality Improvement plan
* Technology profile
 | *
 |
| **Staff Development and Culture** |  |
| * Staff satisfaction survey results, if available
 |  |
| **Program or Significant Project Progress** |  |
| * Grant project work plan update and progress report
 | *
 |

# Environmental Scan Analysis Worksheet

This facilitation worksheet can be used to design the environmental scan discussion following the presentation.

|  |  |
| --- | --- |
| **Rational Objective**: Find key Levers and Blocks, both internal and external to the network that will be incorporated into the development of strategic objectives in order to move towards its future state or vision/mission. (Use an affinity diagram process) | **Experiential Objective**: Feel confident that the key leverage points and underlying blocks have been identified in order to consider strategic options. |
| **Timing and Audience**: 90 minutes total. Network strategic planning participants, for example, network administration/leadership, network board members, other member organization leadership, community members, partner organization leadership, etc. |
| **Pre-requisites:** Environmental scan presented, see environmental scan checklist.  |
| **Opening:** Given the information provided in the environmental scan presentation, we will be considering **“What are the Levers and Blocks that we will either leverage or work around in moving toward our vision?**” In this discussion we will begin by first brainstorming on events and happenings that will help our network move towards its vision (levers) and also those that will get in our way (blocks). We will group our ideas to gain insight on the underlying issues that we need to be aware of and think strategically about when planning for the strategic paths and the direction we will take toward our vision.  |
| **Objective**: (**10 min)**Individually brainstorm *the events and happenings going on in health care, your community, and your organization that are*:* **(Leveraging)** *helping the network move toward its vision*
* **(Blocking)** getting in the way of the network from moving towards its vision
* Working individually, compile a list

Facilitator: this is an affinity diagram process. A sticky wall is a very effective tool for this process. Using flip charts to record and cluster ideas can also be effective.  | **Reflective**: **(15 min)** Individually review brainstorm list and star 4-5 best ideas for both levers and blocks. Start with Levers and work through reflective, interpretive and decisional steps before moving to blocks.Working in pairs: * Select between both lists, the top 4-5 ideas.
* It is best to have a total of 35-45 ideas to work with. For example, if there are eight pairs each pair should contribute five ideas.
* Write one idea per half-sheet using 3-5 words to describe and post on sticky wall or use flip chart to record ideas.
 | **Interpretive**: **(45 min)** Synthesis of data to identify key leverage points and key blocks. Another way to think of this is seeking consensus on underlying issues or causes. Use affinity diagram method to create clusters of ideas.Working as a large group:* Start clustering data into similar ‘key or underlying levers’ or ‘key or underlying blocks’: *What is the underlying issue that these levers or blocks are identifying?*
* Expect 6-8 clusters of ideas/data.

Seek consensus on the key levers and blocks by naming the clusters.* For each cluster of data ask, *“In this cluster, what is the title that best describes the underlying lever or blocking issuing of these ideas?*”
* If there is a ‘lack of’ description ask deeper questions on the cause of the ‘lack of’ issue.
* Titles should be descriptive and most likely include 3-5 words. Write-out the title that was agreed upon and place it above the cluster of ideas.
 | **Decisional: (20 min)**The intent of this section is to prioritize underlying levers and blocks and begin to transition to the strategic planning effort.Working as a large group:Prioritizing Levers and Blocks:* Prioritize w/ Dots: “*What are the top 3 Levers and top 3 Blocks that we need to take into account as critical issues for moving the network toward its vision/mission*”?

Facilitator: Allow 15 minutes for this voting work.Discussion for Debrief and Transition:* Have a participant read organizations vision and another person read through the titles of Levers and Blocks
* *Are there any surprises? Did we get to the underlying issue or the cause?*
* *Of the top 3 Levers, which will be easiest to leverage and take advantage of? Which one will be more difficult? Of the top 3 Blocks which one will be the easiest to deal with or work around? Which one the hardest?*
 |
| **Transition to strategic planning component**: 1. Next Step: Getting started with strategic thinking and planning; we are putting on our critical thinking hats and looking for key paths that will get us from our current reality to our desired future state. We wouldn’t start off for California without a map and we wouldn’t make it there without referring to it every once in a while when things get complex or difficult to navigate.
 |

# Environmental Scan Analysis Documentation

Sample documentation of completed environmental scan discussion including prioritization.

|  |
| --- |
| **Environmental Scan Analysis Documentation****Network Strategic Planning**  |
| **Focus Question:** What are the Levers and Blocks that we will either leverage or work around in moving toward our vision? |
| **Objective and Method:** In this discussion we will begin by first brainstorming on those events and happenings that will help our network move towards its vision (Levers) and those that will get in our way (Blocks). Working in pairs and a large group we will cluster our ideas and look for insight on the underlying issues that we need to be aware of and think strategically about when planning for the strategic paths and the direction we will take toward our vision. To prioritize the Levers and Blocks we will use a voting method, six dots per person, three for each area – key issues have the most dots. |
| **Environmental Levers** | **Environmental Blocks** |
| Prioritized:1. Technology infrastructure including telemedicine, technology knowledge w/ common EHR platforms.
2. Established coalitions exist in each county.
3. Diversity of talent and knowledge of SORHN staff and member staff.
 | Prioritized:1. Financial resources, (i.e. funding opportunities) and sustainability (i.e. shared resources between network and between members).
2. A need to expand our vision as a network; currently too much silo thinking.
3. Physicians should be engaged in the process of network development.
 |
| * Network and members have a survival instinct
* Marketplace is driving action, i.e. demographics and health disparities
* Strong network leadership
 | * Unclear clear plan for growth
* Resistance to technology, i.e. HIE
* Lack of time to implement and develop
* Competing priorities for members
 |

# Strategic Objective Worksheet

This facilitation worksheet can be used to design the strategic objective discussion and consensus planning following the Environmental Scan Analysis.

|  |  |
| --- | --- |
| **Rational Objective**: Gain group consensus on strategic objectives that address the Levers and Blocks and moves the network toward its vision/mission. | **Experiential Objective**: Planning participants agree that the identified strategic objectives are doable and will provide guidance to the organization over the coming 2-3 years. |
| **Timing and Audience**: 120 min. Network strategic planning participants, for example, network administration/leadership, network board members, other member organization leadership, community members, partner organization leadership, etc. |
| **Pre-requisite:** Completed environmental analysis with priority setting of underlying Levers and Blocks.  |
| **Opening**: Together we will be considering **“What are the key strategic objectives that will guide this organization from today’s reality toward tomorrow’s vision?”** We have agreed on our network vision and identified the key Levers and Blocks of our current reality. In this discussion we will begin brainstorming actions and activities that will move us toward our vision and then spend time together identifying key strategies that our ideas describe; seeking consensus on the strategic goals or objectives that will provide guidance to our network over the coming 2-3 years.  |
| **Objective:** (**10 min)**Individuallybrainstorm:* What are the ideas, initiatives, tasks, or to-do’s that will address the environmental scan issues that are impacting the network?
* Working individually, compile a list

Facilitator: This is an affinity diagram process. A sticky wall is a very effective tool for this process. Using flip charts to record and cluster ideas can also be effective.  | **Reflective:** (**20 min)**Individually review brainstorm list and star 4-5 best ideas.Working in pairs: * Compare between both lists, the top 4-5 ideas.
* It is best to have a total of 35-45 ideas to work with. For example, if there are eight pairs each pair should contribute five ideas.
* Write one idea per half-sheet using 3-5 words to describe and post on sticky wall or use flip chart to record ideas.
 | **Interpretive:** (**70 min)**Working as a large group synthesis of data to identify key leverage points and key blocks. Another way to think of this is seeking consensus on strategic directions or objectives. Use affinity diagram method to create clusters of ideas.* Cluster data into similar ideas. What is the common thread or strategic path being described by this data that moves the network from today’s reality to tomorrow’s vision?
* Seek consensus on the key strategic directions or objectives by naming the clusters. For each cluster, ask *“in this cluster, what is the title that best describes the strategic idea?*”
* Titles should be descriptive and action oriented, for example, 3-5 words: **verb + adjective + noun**. Example: Improve Operating Efficiency, Provide Outstanding Customer Service, and Deliver Timely and Effective Care.
* Write Strategic Objective Title on full sheet (Green) w/ border and place at top of cluster.
 | **Decisional:**  (**20 min**)The intent of this section is to prioritize the strategic objective and set commitment to the strategic objectives (strategic objectives = titles agreed upon in the interpretive step). * Read the titles across and refer back to the overall planning question: (TITLEs) are our key strategic objectives that will guide this organization toward its vision.

Ask participants:* How do these strategic objectives align with our network’s mission?
* Which of these strategic objectives are critical to our network’s sustained success?
* Which will take more focus and dedication of us as members?
* How will we as network leaders be involved in promoting and communicating these strategic objectives?
 |
| **Begin to transition to evaluation, communication, and work plan development:**Next Step: Double check for SMART objectives and revise as needed before final approval by network board. Begin to develop specific targets and benchmarks and consider evaluation measures for each strategic objective. Identify a strategic budget and activities that will move the network toward its vision. Identify which board members and partners need to track progress and successes of the network toward the network vision; develop a communication plan and dashboard. |

# Strategic Objective Documentation

Sample documentation of completed strategic objective discussion and consensus planning with highlighted vision and objectives.

|  |
| --- |
| **Strategic Objective Documentation: Network Strategic Planning** |
| **Network Vision**: We are a network of health delivery systems in our rural communities creating integrated solutions to improve the quality and coordination of care, expand access to care, and improve cost effectiveness. |
| **Focus Question:** What are the key strategic objectives that will guide this network from today’s reality toward tomorrow’s vision?  |
| **Objective and Method:**  Gaining consensus agreement on key strategic objectives that are aligned with our network’s vision*.* We have committed to our network vision and identified the key levers and blocks of our current reality. In this discussion we will begin by individual brainstorming actions and activities that will move us toward our vision and then spend time together clustering our ideas and gaining consensus on key strategic objectives that will provide guidance to our network over the coming 2-3 years. |
| **Consensus Strategic Objectives** | **Develop Revenue Generating Services for Network Sustainability**  | **Support Member Awareness of Health Care Changes** | **Nurture Member Relationships** | **Increase Board Engagement** | **Promote Network Visibility** | **Increase Provider Involvement** |
| Small Group Ideas and Actions Data | * Yearly dues
* Develop regional purchasing group
* Revenue generating services
* GPO with local retailers
* Expanding revenue streams
* Community health education
* Telemedicine partnerships
* Revenue through telemedicine
* IT technical assistance [for both] software/hardware
* Educate members on current technologies
* Develop physician recruitment service
* Develop HR support service
 | * Educate physicians on HIE
* Outreach and education for health insurance marketplace
* Website development for education
* Educate members about healthcare market
* Physician education on changes
* Attend national conferences on health care changes, PCMH, ACO, etc.
 | * Roundtables
* More communication on sharing
* Develop member round-table for discussion
* Consistent and effective communication structure
* Utilize a member list serve
* Complete member collaboration assessment
 | * Institute board meeting consent agenda
* Develop network strategy dashboard
* Network director meets 1:1 with board members
* Complete member needs assessment
* Gain board consensus on network vision
* Complete board member training on collaboration and cooperation
 | * Brand marketing plan; including member services and vision
* Attend member leadership meetings two times per year
* Ad campaign; website, Facebook, etc.
* Host community education event
* Recruit champions in community partner organizations
 | * Create an advisory committee of providers to navigate health care changes
* Bring providers onto network board
 |

#

# Alignment of Objectives with Vision and Mission Worksheet

Use this facilitation worksheet to design the discussion to ensure alignment of the objectives with the vision and mission of the network.

|  |  |
| --- | --- |
| **Rational Objective**: confirming alignment of new strategic objectives with network vision and mission | **Experiential Objective**: have the group gain understanding and comfort of new network strategic objectives relative to the organization’s vision and mission |
| Timing and Audience: 10-15 minutes. Network strategic planning participants, for example, network administration/leadership, network board members, other member organization leadership, community members, partner organization leadership, etc. |
| **Opening:** “From the beginning of our strategic planning efforts we have worked to aim our thinking and our strategies toward our Network vision recognizing that it is our share vision that is pulling our network forward. [Read through vision that is posted on the wall nearby for everyone to see. It is nice to have the Vision posted to the left of the strategic objects in a location like a ‘target’]. So let’s spend the next 15 minutes or so checking our new strategic objectives back to our vision to double check that we are indeed aiming for it.”  |
| **Focused Conversation:** Have someone read through each of the newly agreed upon Strategic Objectives and then ask: * Which of these objectives are ah-ha’s or surprises? Any that really ‘hit the nail on the head’?
* How do these strategic objective move us toward our vision?
* Are there any themes running through the objectives?
	+ *[if objectives are identified as ‘similar’ in strategy, then rearrange the information to group those objectives next to each other and consider adding a larger title to capture the common idea]*
* Which of these objectives are going to be more difficult to operationalize or will need careful monitoring?
	+ *[Place a star by the identified objectives to highlight them. This is a good place to emphasize the role of the board to monitor progress toward the strategic objective and the Network’s leadership and staff’s role to operationalize the objectives into actions and initiatives]*
* Of our current initiatives; where would you align them with the newly developed strategic objectives?
	+ *[write the initiative next to the strategic objective]*
* Do any of our current initiatives not fit with these strategic objectives?
* What might be the impact be on your communities as our network uses these objectives to guide our work?
* What is our commitment to these strategic objectives to guide our work toward our vision?
	+ *[Check in with everyone at a consensus to accept with a Thumbs-Up, Hand Flat, or Thumbs-Down - do not complete the planning with our full consensus which = flat hand or thumbs-up – if there are any thumbs-down then more discussion is needed]*
 |
| **Last Steps of Strategic Planning event:** Our last steps in the strategic planning event is to have formal acceptance of the strategic objectives by the board and begin to plan communication, work planning and evaluation of the objectives.  |

# Strategic Objective Map

Sample documentation of board approved (SMART) strategic objectives within the Balanced Scorecard framework and referred to as a strategy map.

**[Network] Strategic Objective Map**

[Network] Vision

**Internal Processes**

**Financial**

**Customers & Partners**

**Learning & Growth**

[Network] Mission

2D

3E

3G

3F

2C

1B

1AA

**Business 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**

**Staff Development & Culture**

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

**Develop Network Leadership Capacity**

**Members and Partners**

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

**Nurture Member Relationships**

**Support Member Awareness of Health Care Changes**

**Internal
Processes**

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

**Promote Network Visibility**

**Increase Board Engagement**

**Increase Provider Involvement**

# Strategic Objective Logic Model

 Sample documentation of board approved (SMART) objectives within a logic model framework

**[Network] Logic Model**

[Network] Vision

**Internal Processes**

**Financial**

**Customers & Partners**

**Learning & Growth**

[Network] Mission

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Program Goals** | **Activities** | **Outputs** | **Mid Term Outcomes** | **Long Term Outcomes** |
| Goal 1:  | * A
* B
 | * 1A
* 1B
 | **1 Network Visibility Expanded** | **1 Network Services Generating Revenue** |
| Goal 2:  | * C
* D
 | * 2C
* 2D
 | **2 Provider Involvement Increased** | **2 Members More Aware of Health Care Changes** |
| Goal 3:  | * E
* F
 | * 3E
* 3F
 | **3 Board Engagement Stronger** | **3 Member Relationships Improved** |
| * G
 | * 3G
 | **3 Network Leadership Capacity Increased** |

# Strategic Planning Resources

* Aim for Impact and Sustainability: Strategic Planning, National Rural Health Resource Center <https://www.ruralcenter.org/rhi/network-ta/aim-for-impact>
* Baldrige Performance Excellence Program: Health Care <http://www.nist.gov/baldrige/publications/hc_criteria.cfm>
* Business Model Canvas, Business Model Generation <http://www.businessmodelgeneration.com/canvas/bmc>
* Integrating the Strategic Plan, Logic Model, and Workplan, Evaluation Research Team <http://www.cdc.gov/healthyyouth/evaluation/pdf/brief5.pdf>
* Strategic Planning Basics, Balanced Scorecard Institute <http://balancedscorecard.org/Resources/Strategic-Planning-Basics>
* Strategic Planning Process Outline, Center for Rural Health University of North Dakota School of Medicine and Health Sciences <https://www.ruralcenter.org/tasc/resources/strategic-planning>
* Strategic Planning That Leaves you Smiling, Studer Group (webinar recorded 10/13/2014) <https://www.studergroup.com/resources/news-media/articles/studer-group-to-host-national-rural-health>
* Strategic Planning That Works: Integrating Strategy with Performance, American College of Healthcare Executives (webinar series ACHE members: $530, Non-members: $605) <http://www.ache.org/seminars/online_detail.cfm?PC=ONLSTPLAN>