Strategic Planning Template

Network Development Technical Assistance

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# How to use this Strategic Planning Template

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 TA to the Network Development grantees through a contract with the Federal Office of Rural Health Policy.

**Purpose of this Template and Guide**

This Program Strategic Plan Template is designed to provide support to Network Development grantees to create a program strategic plan. The associated Strategic Planning Guide, Presentation 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. Content for this Strategic Planning Template have been adapted from multiple sources, including, The National Rural Health Resource Center Strategic Planning service, and Rural Assistance Center On-line Library. [See the Resources section for helpful links and documents.](#_Strategic_Planning_Resources)

This Program Strategic Plan Template is designed to provide support to Network Development grantees to write an effective and dynamic Strategic Plan based off of a participative planning event. The desired outcome is board approved strategic plan with measurable, realistic, and timely objectives to guide the network over the coming 2-3 years. Although a specific template for the Strategic Plan is not required as part of the grant deliverable, the following components are recommended:

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

These components are not specific to a planning approach. The key is to use consistent language within whatever approach is selected. The associated Strategic Planning Guide 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.

# Strategic Plan Components

## **Program Description and Shared Vision:**

Set the context for the strategic planning effort and process. Keep this section to no more than one page.

* Program Description including network mission, these may be program goals.
* Program and/or organization history.
* Program and/or organization members.
* Include a brief description of the process for review and consensus of the shared program or organization vision.
* It is critical for the organization’s vision to be committed to by leadership, staff, and stakeholders in the early steps of planning. One way to achieve this is to have an intentional check-in and commitment discussion on the vision with the stakeholders and planners.
* There are many ways to design and complete a Vision Check-In and Commitment discussion. *See Strategic Planning Guide: Worksheet for Vision Check-In and Commitment* for one approach using a consensus-based method to assist a diverse group of stakeholders to carefully consider and discuss the vision of the organization.

## **Strategic Planning Approach and Design**

Briefly describe the planning approach and design of the strategic plan.

* Describe rationale of the planning, i.e. why is strategic planning important to this program? How will the strategic objectives be used over time?
* Describe strategic planning approach by identifying the planning framework that will be used to communicate the objectives, such as, logic model, balanced scorecard, business model canvas, Baldrige performance excellence, etc.
* Describe the level of cooperative participation necessary/needed and include a list of stakeholder groups involved in the planning.

## **Environmental Scan and Analysis**

Meaningful and comprehensive strategic planning requires participants to consider, analyze, and prioritize environmental information. This is a critical step in strategic planning and requires intentional preparation and process. The results of the Environmental Scan Analysis and priority setting informs the strategic planning process. Listing results of the environmental scan analysis should be no more than 1 page. A chart of the findings may be a useful format.

* An environmental scan includes information that is pertinent for all of the strategic planning participants to draw from to understand the internal and external factors and drivers that may influence the future of the network. *A comprehensive listing is available in the Strategic Planning Guide: Environmental Scan Checklist*. Selecting only the information that is pertinent to the specific planning environment is appropriate.
* There are many approaches for designing and completing an Environmental Scan Discussion and Analysis. The key is to use a participative process that provides all stakeholders with an opportunity to consider the environmental information and seek the underlying barriers and opportunities that will inform strategic thinking. The Sample Environmental Scan Workshop provides one approach using a consensus-based method that gathers many ideas and groups them into similar environmental levers and blocks. *See Strategic Planning Guide: Environmental Scan and Analysis Worksheet and Documentation*

## **Strategic Objectives**

Strategic planning that has the intention of creating meaningful strategic objectives requires a participative process that is designed to support strategic thinking focused 2-3 years into the future toward the vision of the organization. The product of strategic planning includes realistic and measureable strategic objectives based on the consensus of the participating stakeholders. These objectives are then approved by the organization governing body and operationalized by organization leadership and staff.

* There are many approaches for designing and completing a strategic plan. The Sample document provides one approach using a consensus-based method that gathers many ideas and groups those ideas into similar strategic objectives. *See Strategic Planning Guide: Strategic Objective Worksheet, Strategic Objective Documentation*
* One of the keys for effective strategic objectives is to check for alignment of the objectives with the organization’s vision and mission prior to final approval by the organization’s governing board. *See Strategic Planning Guide: Worksheet for Alignment of Objectives with Vision and Mission Discussion*

1. Communication Plan

Describe the plan for communicating the approved strategic objectives and the environmental analysis with stakeholders, staff, members, and partners. Limit the narrative of this section to no more than one page. A chart format may be useful in describing the communication plan.

1. Identify the stakeholders and their need for or potential use of the information
2. Identify respective modes, methods and timing for presenting the findings to stakeholders

## Operationalize with Work Plan

Describe how the approved strategic objectives and environmental analysis are incorporated into the work plan. Limit this section to no more than one page. A diagram that illustrates alignment between objectives and the larger work plan activities may be useful. An example may be a Scorecard that shows the progression from goals/objectives, measures and targets, activities and timeline or a logic model that links the objectives (program outcomes) with the process activities and inputs.

## Monitoring and Adjusting with Evaluation Plan

Describe how the approved strategic objectives will be monitored and reviewed over time. Limit this section to no more than one page. A dashboard of the strategic objectives with key measures, targets and results may be useful, [RHI Program Evaluation Plan Guide and Template](https://www.ruralcenter.org/network-ta/resources/program-evaluation-planning-and-tools)