

*Creating a Strategic Plan
for Your Health Department*
February 10, 2015
Middlesex County Fire Academy, Sayreville

Presented by:
Mary L. Kushion, MSA

Welcome and Overview

Workshop Objectives

- * Identify the key elements of a HD Strategic Plan
- * Recognize the connections between the plan and other agency documents
- * List key stakeholders needed in the development
- * Discuss agency goal and objective development
- * Create a draft timeline for plan development

Strategic Planning

- * Creating a written agency-wide plan that works for your organization
- * Allows the agency to make data-driven decisions
- * Proactive approach
- * Includes an evaluation component
- * Uses agency strengths to address challenges

Key Elements of a Strategic Plan according to PHAB Standard 5.3

- * Documented Planning Process
- * Adopted Strategic Plan
- * Documented Progress towards achievement of goals

Today's Focus

- * **Documented Planning Process**
- * **Adopted Strategic Plan**
- * Documented Progress towards achievement of goals

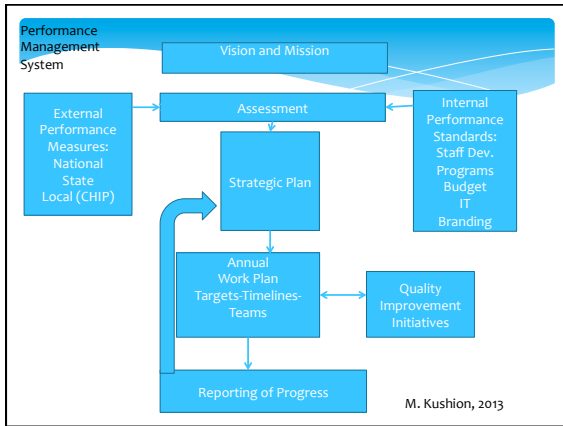
Planning Process... It Begins Today!

PHAB 5.3.1A "The health department must document the process it used to develop its organizational strategic plan."

- *Formation of a Planning Group
- *Documentation of the Planning Process Steps

5.3.2A Adopted department strategic plan – PHAB REQUIRES:

- * Mission, Vision, guiding principles/values
- * Strategic Priorities
- * Goals and Objectives with measureable time-framed targets
- * Consideration of key support functions required for efficiency and effectiveness
- * Identification of external trends, events or factors
- * Assessment of strengths and weaknesses
- * Link to the health improvement plan and QI plan



Taking the first step... and then the second...

- * Assemble your core team
- * Assemble the documentation and data you have available
- * Set aside time for strategic planning meetings
- * Develop a template that works for your organization
- * Remember to document the process as well as the final product!

Let's take a 15 minute break!

Who is on the Team

- * Start small and build as the process develops
- * Include all staff
- * Include board members
- * Invite stakeholders to provide input

Strategic Scavenger Hunt

- * Mission, Vision, Values
- * Annual reports
- * Local/State Mandates and Priorities
- * Fiscal information
- * Assessments
 - * Community Health Assessment
 - * Internal staff assessments – PHAB, employee satisfaction, past planning efforts
 - * Customer satisfaction surveys

More Data Sources to consider

- * Agency financial audits
- * Policy and legislative scans
- * QI initiatives and results
- * Program evaluations

Questions to ask as you organize

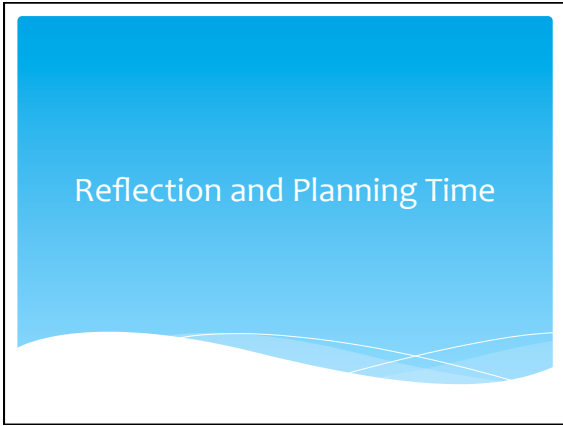
- * What period of time will the plan cover? 3 years? 5 years?
- * Who is capturing the documentation?
- * Who needs to approve the plan?
- * Do we have access to the data we need to develop a plan?
- * Who is going to facilitate the process?
- * How do we keep staff and the board informed and engaged?
- * What is the budget for the process? Is there a budget?

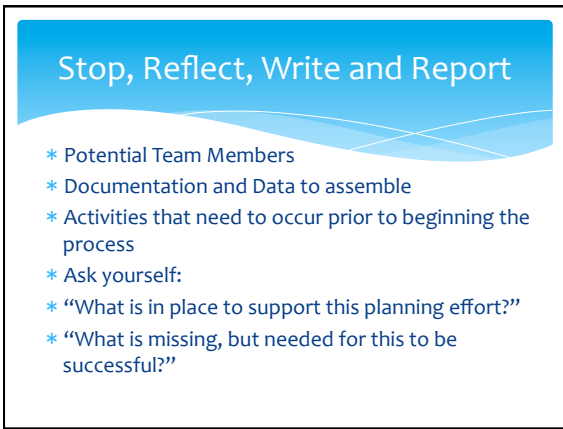
Strategic Planning Sessions

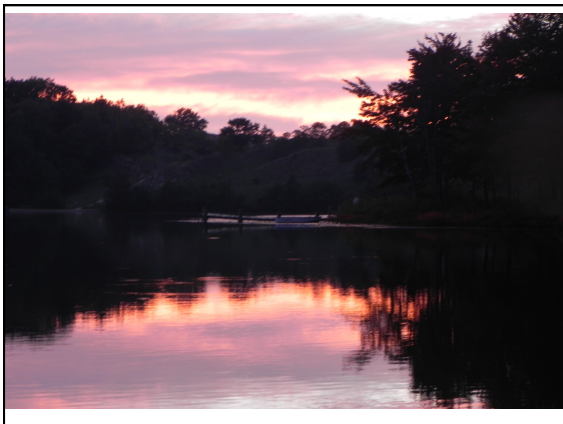
- * Review of assembled materials
- * Review your current Vision and Mission statements; revise?
- * Conduct a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis
- * Identify initial gaps and weaknesses that exist and the plan will need to address

SWOT Analysis

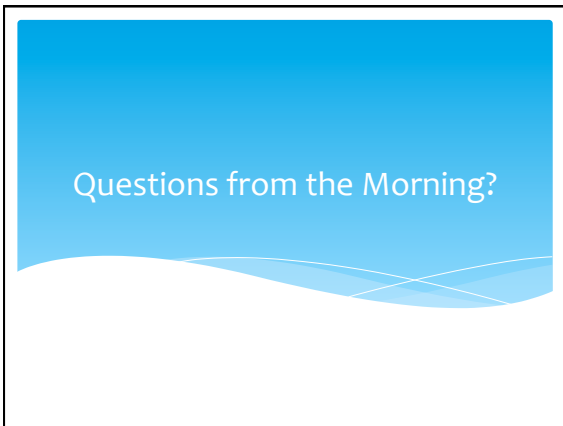
Strengths (Internal)	Opportunities (External)
What do we have internally that we can leverage to assure the plan is successful?	What are the opportunities in the community/state/nation that we can partake in to build our success?
Weaknesses (Internal)	Threats or Challenges (External)
What are the areas where we can improve?	What are the challenges that have a potential impact on our agency and need to be addressed?













PHAB: “Goals and objectives with measurable time-framed targets”

More guidance from PHAB:

“The health department’s goals and objectives with measurable and time-framed targets (expected products or results). Measureable and time-framed targets may be contained in another document such as an annual work plan. If this is the case, the companion document must be provided with the strategic plan for this measure.”

Strategic Thinking

Strategic thinking requires making conscious choices about how to use limited resources to achieve your purpose in response to a dynamic environment. Therefore, strategic thinking includes making decisions regarding what you will and will not do, where you should focus your energies, and what your overall priorities should be.

Allison and Kaye 2005

Establish Your Goals

Starting with your core team....

- * Strategic Directions you intend to accomplish by the end of the plan.
- * Long-range – span the life of the plan
- * Have a manageable number
- * Designate – recruit – seek Goal Champion(s)


Go with What You Know

- * Federal, State and Local Mandates you need to achieve/maintain
- * Responsibilities from the community – CHIP
- * Board priorities
- * Management priorities
- * Gaps and threats identified in the SWOT analysis
- * Brainstorming on what will help you achieve Vision


Internal Priorities

- * Areas needing improvement to meet PHAB Requirements or 10 essential public health services
- * Administrative Process Development
 - * Workforce Development Plan
 - * Performance Management System
- * Communication Methods
- * Branding/Social Media
- * Technology

Table Talk Time




- * How has your organization prioritized its work in the past?
- * What are 2-3 potential goals you would like to see implemented in your strategic plan?
- * Who needs to be involved to achieve them?



Seek and Listen to Staff

- * Allows for staff input and buy-in for the process; ownership
- * They will come up with ideas leadership may not have thought of during the process
- * Their priorities may be different from leadership priorities
- * Make it an enjoyable experience



Prioritizing

- * Multi-voting technique – “Dotmocracy”
- * Prioritization Matrix
- * The Hanlon Method
- * Nominal Group Technique

Once you know your priorities, add Objectives to the Goals

PHAB: measurable and time-framed targets

SMART Objectives:
S- Specific
M- Measurable
A- Achievable
R -Relevant
T- Time-oriented

How are you going to do that?

- * Involve a larger group – seek Board input!
- * Develop strategies for implementation
- * Develop a timeline for implementation
- * Develop measurements – process and outcome measures
- * Assess whether this would be a potential QI project

Strategic Plan – Write it! Share it!

- * Develop a template that works for your organization
- * Complete the template – several drafts may be necessary
- * Share it with staff, board members and interested/ identified stakeholders – document this!
- * Obtain the necessary “approvals” and have agency director sign the cover page.

Annual Work Plan

- * Identify the objectives and strategies selected for implementation the 1st year
- * Create a work plan – include time frames, reporting requirements, lead/key staff members, strategies and status updates
- * Decide on reporting frequency
- * Review at staff meetings – keep it out in front so everybody sees it and knows what is happening
- * Review progress made annually to update the strategic plan and create year 2 workplan

IF you do these things... You will have:

- *Involved staff at all levels and the board in the development of the plan (5.3.1. RD 1 a.)
- *Documented the planning process (5.3.1. RD 1.b)

IF you do these things... You will have:

- * Adopted a strategic plan that includes:
 - * Mission, vision, guiding principles/values
 - * Strategic priorities
 - * Goals and objectives
 - * Consideration of your IT, workforce development, communication/branding and financial sustainability
 - * Identified external trends
 - * Assessed strengths and weaknesses
 - * Linked your plan to your CHIP and QI plans

The required elements for PHAB 5.3.2 a-g

IF you do these things... You will have:

- * Developed a process to report out progress towards achievement of the goals and objectives contained in the plan. (PHAB 5.3.3A)

Next Steps

- * Discuss what you have learned today with staff and develop a course of action for the strategic plan development.
- * Technical assistance calls will be available to you – keep track of questions you have to discuss.
- * Complete the on-line evaluation

Final Reflections and Questions

Thank You!
Have a healthy day!



Mary Kushion Consulting, LLC
P.O. Box 363, Alma, MI 48801
mkushion@gmail.com
989-463-1875
