

Agenda for Overview sessions:

1. Introductions and Expectations (10:00- 10:15)
 - *Tool: Consensogram*
2. Review the Strategic Planning Process and Organizational Assessment philosophies. Minimal overview of Baldrige and Hoshin Planning. (10:15-10:45)
 - *Tool: System's Analysis*
3. Review, create, or modify the mission and vision for the Public Health Agencies (state and regional) (10:45-11:00)
 - *Tool: Venn Diagram or*
 - *Tool: P3T*
4. Create a consolidated list of Strategic Advantages and Challenges facing Public Health (11:00-11:30 with step 5)
 - *Tool: Brainstorm*

Lunch (11:30-12:00)

5. Review and establish a list of Key Core Competencies (12:00- 12:30)
 - *Tool: Affinity Diagram and Matrix- Capacity*
6. Assessment of the strengths and opportunities for improvement regarding the local public health agencies *Exercise: Gallery Walk* (12:30-1:30)
 - *Tool: Survey*
7. Determine top strengths (best practices) and opportunities for areas of the strategic plan (1:30 – 2:00)
 - *Tool: NGT (consensus building) and/or*
 - *Tool: Multi-voting.*
8. Create priorities for improvements and regional best practices (2:00 - 2:30)
 - *Tool: Inter-relationship*
 - *Tool: Benchmarking: Numerical and Process*
9. Conclude with next steps for strategic planning process including building objectives, strategies and tactics based on the above priorities (Hoshin Planning). (2:30 – 3:00)
 - *Tool: PDPC: Process Decision Program Chart*
10. Wrap-up and Evaluation (3:00)
 - *Tool: Survey*

Definitions:

- **Client/Customer** - In Health Care, the term "customer" refers to actual and potential users of your organization's services or programs (referred to as "health care services"). Patients are the primary customers of health care organizations. The organizations address customers broadly, referencing current and future customers, as well as the customers of your competitors and other organizations providing similar health care services.
- **Key Core Competencies** - The term "core competencies" refers to your organization's areas of greatest expertise. Your organization's key core competencies are those strategically important capabilities that are central to fulfilling your mission or provide an advantage in your marketplace or service environment. Core competencies frequently are challenging for competitors or suppliers and partners to imitate, and they may provide a sustainable competitive advantage. Absence of a needed organizational core competency may result in a significant strategic challenge or disadvantage in the marketplace. Core competencies may involve technology expertise, unique service offerings, a marketplace niche, or particular business acumen (e.g., health care delivery start-ups).
- **Senior Leadership** - The term "senior leaders" refers to an organization's senior management group or team. In many organizations, this consists of the head of the organization and his or her direct reports. In health care organizations with separate administrative/ operational and health care provider leadership, "senior leaders" refers to both sets of leaders and the relationship between them.
- **Stakeholder** - The term "stakeholders" refers to all groups that are or might be affected by an organization's services, actions, and success. Examples of key stakeholders might include patients, patients' families, the community, insurers and other third-party payors, employers, health care providers, patient advocacy groups, departments of health, students, the workforce, partners, collaborators, governing boards, stockholders, investors, charitable contributors, suppliers, taxpayers, regulatory bodies, policy makers, funders, and local and professional communities.
- **Strategic Advantages** - The term "strategic advantages" refers to those marketplace benefits that exert a decisive influence on an organization's likelihood of future success. These advantages frequently are sources of an organization's current and future competitive success relative to other providers of similar health care services. Strategic advantages generally arise from either or both of two sources: (1) core competencies, which focus on building and expanding on an organization's internal capabilities, and (2) strategically important external resources, which are shaped and leveraged through key external relationships and partnerships. When an organization realizes both sources of strategic advantage, it can amplify its unique internal capabilities by capitalizing on complementary capabilities in other organizations.
- **Strategic Challenges** - The term "strategic challenges" refers to those pressures that exert a decisive influence on an organization's likelihood of future success. These challenges frequently are driven by an organization's future collaborative environment and/or competitive position relative to other providers of similar health care services. While not exclusively so, strategic challenges generally are externally driven. However, in responding to externally driven strategic challenges, an organization may face internal strategic challenges. External strategic challenges may relate to patient, stakeholder, or health care market needs or expectations; health care service or technological changes; or financial, societal, and other risks or needs. Internal strategic challenges may relate to an organization's capabilities or its human and other resources.
- **Strategic Objective** - The term "strategic objectives" refers to an organization's articulated aims or responses to address major change or improvement, competitiveness or social issues, and health care advantages. Strategic objectives generally are focused both externally and internally and relate to significant patient, stakeholder, market, health care service, or technological opportunities and challenges (strategic challenges). Broadly stated, they are what an organization must achieve to remain or become competitive and ensure long-term sustainability. Strategic objectives set an organization's longer-term directions and guide resource allocations and redistributions.
- **Strategy** - The term "strategy" refers to the organization's methods that relate to the top-level Strategic Objective. Often they are actionable in nature and relate to the work that is being completed in the organization. Strategies can be broken down into sub-strategies at the departmental level for further alignment and definition. Strategies have linked "Tactics" definition of time, measures, and process. Please see Tactics and Strategic Objectives for more detailed information.
- **Sustainability** - The term "sustainability" refers to your organization's ability to address current organizational needs and to have the agility and strategic management to prepare successfully for your future organizational, market, and operating environment. Both external and internal factors need to be considered. The specific combination of factors might include health-care-industry wide and organization-specific components. Sustainability considerations might include workforce capability and capacity, resource availability, technology, knowledge, core competencies, work systems, facilities, and equipment. Sustainability might be affected by changes in the marketplace and in patient and stakeholder preferences, changes in the financial markets, and changes in the legal and regulatory environment. In addition, sustainability has a component related to day-to-day preparedness for real-time or short-term emergencies.
- **Tactic** - The term "Tactic" refers to the detailed action or process goals that directly relate to Strategic Objectives and Strategies. Tactics often have elements of timelines, specific achievable measurements, detailed process or change steps, and implementation plans. Tactics are often written at the departmental or employee level of execution and must include input from the employees during creation.

Gallery Walk of Questions for Strategic Planning

Leadership (1)

- How do seniors leaders actions guide and sustain the organization?
- How do senior leaders communicate with workforce and encourage high performance?
- What is your organization’s governance system and approach to leadership improvement?
- How does your organization ensure legal and ethical behavior? Fulfill societal responsibilities?

Strategy (2)

- What is your strategy planning process?
- How do the strategy objectives address strategic challenges and advantages?
- How do you deploy the strategic and action plan to all levels of the organization and to all programs?
- How do you measure progress of the strategic plan? Key comparisons/benchmarks for services?

Client (Customer) Focus (3)

- How do you listen to your clients/customer and gain from satisfaction and dissatisfaction feedback?
- How do your listening methods vary for different customer groups, stakeholder groups, or market segments?
- How do you engage clients/customer and stakeholders to serve their needs and build relationships?
- How does your organization determine health care service offerings?
- How does your organization determine customer and stakeholder communication mechanisms to support the mission?

Measurement, Analysis & Knowledge Management (4)

- How do you measure, analyze, review and improve organizational and program performance?
- How do you manage your information, organizational, knowledge, and information technology?
- How do you determine service offerings (addition, editing, eliminating)?

Workforce Focus Environment and Engagement (5)

- How do you build an effective and supportive workforce environment?
- How you manage workforce capability and capacity to accomplish the work of the organization?
- How does your organization maintain a safe, secure, and supportive work climate?
- How do you engage your workforce to achieve organizational, program, and personal success?
- How does your organization compensate and reward your workforce to achieve high performance?
- How are members of your workforce, including leaders, developed to achieve high performance?

Programs and Process Management and Improvement (6)

- How do you design and improve your programs?
- How do you design, manage, and improve your key work processes?
- How do you use data to measures progress and improvement?

Results (7)

- What organizational **measures** does your organization collect and report for:
 - Program outcomes?
 - Financial and market performance?
 - Client service?
 - Workforce feedback?
 - Leadership and governance results?

What organizational or program measures do you think are important for your work and the success of the organization and its programs?

Tool Kit:

1. Affinity Diagram
2. Benchmarking: Numerical and Process
3. Brainstorming
4. Consensogram
5. Inter-relationship Diagram
6. Matrix: Capacity
7. Multi-Vote
8. NGT – Nominal Group Technique
9. P3T – Paper Passing Purpose Tool
10. PDPC - Process Decision Program Chart
11. Survey
12. System's Analysis
13. Venn Diagram

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