

Strategic Planning
Operational Skills Workshop Series
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Introduction

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Definitions
Establishing common language

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What is Strategic Planning?

Strategic planning is a process for defining and determining an organization's roles, priorities, and direction over three to five years



What is a Strategic Plan?



- A strategic plan is an organizational road map for the future
 - Creates communication opportunities
 - Guides decision-making (direction)
 - Establishes priorities (places you must see)
 - Establishes some parameters (route)
 - Allows for options if needed (detour)

What makes a plan "strategic"

- Continual attention to changes in the organization and environment and the potential impacts on the organization.
- Roadmap to achieve your vision
- Alignment of efforts to increase efficiency and results
- Careful, artful planning of action to achieve goals

Health Equity



- The attainment of the highest possible level of health for all people. It means achieving the environmental, social, economic and other conditions in which all people have the opportunity to attain their highest possible level of health.



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Why use a Health Equity Lens?



- Structural inequities are often produced inadvertently
- These internal structures, policies, processes, etc. are so embedded into the organization that it may be difficult to "see" the inequities
- Every decision an organization makes has an impact on people – both inside the organization and externally
- Good ideas can play out in ways that inadvertently disadvantage or harm certain groups.
- Provides an objective means of ensuring that health equity is considered

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Why does Strategic Planning Matter?

- Sets forth what an organization plans to achieve, how it will achieve it, and how will it know if it has achieved it.
- Addresses your county's public health needs while allowing you to adapt to a changing environment.
- Fundamental tool for effective management
- Plan provides criteria for monitoring progress and outcome of the plan to justify the use of local and state resources.

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Things to Consider




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Strategic Planning Process



- Strategic planning focuses on the entire agency
- Timeframe
- Participants for your process
- There are many ways to do strategic planning; regardless of the process, there are five main elements.
 1. Develop a shared understanding of why an organization exists and its aspirations for the future.
 2. Information needs to be gathered and reviewed
 3. Strategic priorities
 4. Implementation of work plans
 5. Evaluation and monitoring progress



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Develop a shared understanding of why an organization exists and its aspirations for the future

- Why you exist, what you want to achieve, what defines you
 - Why you exist - why you exist, what you do, and who you serve
 - Example - Protecting and improving the health of Iowans.
 - What you want to achieve - what does success in what you do look like?
 - Example - Healthy Iowans in healthy communities.
 - What defines you - what do you care about, what sets you apart from other public service providers.
 - Example:
 - Accountability
 - Collaboration/teamwork
 - Communication
 - Health Equity
 - Quality
 - Results Oriented
 - Workforce Development



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Information needs to be gathered & reviewed

- Gather Data
 - Data can include:
 - CHNA/HIP report
 - County demographics
 - Department annual reports
 - LPH system assessment results
 - Department financial analysis
 - Workforce assessments
 - Policy and legislative scans
 - Department program evaluations and quality improvement results
 - Customer service/satisfaction feedback
 - Results of SWOT and SOAR

SWOT

<p>Strengths Positive tangible and intangible attributes, internal to the department. Within the department's control. Need to be maintained, built upon or leveraged.</p> <ul style="list-style-type: none"> • What advantages does your council have? • What do you do better than anyone else? • What unique or lowest cost resources can you draw upon that others can't? • What do people in food system field see as your strengths? 	<p>Weaknesses Factors within the department's control that detract from its ability to attain desired goals. Which areas might the department improve? Need to be remedied, changed, or stopped.</p> <ul style="list-style-type: none"> • What could you improve? • What should you avoid? • What do others see as your weaknesses?
<p>Opportunities External attractive factors that represent the reason for the department to exist. Which opportunities exist in the environment, which will propel the council? Need to be prioritized, captured, build on and optimized.</p> <ul style="list-style-type: none"> • What good opportunities can you spot? • What interesting trends are you aware of? 	<p>Threats External factors beyond department's control which could place department's mission or operation at risk. Need to be countered or minimized and managed.</p> <ul style="list-style-type: none"> • What obstacles do you face? • What are other PH agencies doing? • Are quality standards for public health changing?

SOAR

<p>Strengths</p> <p>What are your greatest strengths? What is working really well? What do you value most in the organization? What are you most proud of?</p>	<p>Opportunities</p> <p>What are the best opportunities for your organization? How can you meet the needs of the stakeholders? Where can you add value and benefit to others?</p>
<p>Aspirations</p> <p>What are your hopes for the organization? What would you like the future to look like? What are you deeply passionate about? What projects, programs and services would support these dreams?</p>	<p>Results</p> <p>How do you know you are reaching your goals for the organization? What are 3-5 indicators or measures that will let you know you are achieving the preferred future? What will be different for the stakeholders? Who is going to be responsible for making things happen?</p>



Strategic Priorities



- Prioritization of themes
 - Identify the categories
 - Examples
 - Systems Development
 - Education
 - Health Equity
 - Workforce Development
 - Select priority areas
 - Flush out the details for each selected priority in your implementation work plan
 - May include partnerships, communication, policies, etc. that fall under one or more of the priority areas.

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Implementation of work plans

- Strategic issues can be sorted in three categories.
 1. Those for which no action is required at present, but which must be monitored
 2. Those that are coming up on the horizon and are likely to require some action in the future and perhaps some action now
 3. Those that require an immediate response.

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Implementation plans include the following:

- Specific programs, activities and interventions that will be implemented to address each objective.
- Who is responsible or accountable for each activity (i.e. staff member, team or department).
- Timeline for completion.
- Measurement plan showing when and how goals and objectives will be measured.

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Evaluation and monitoring progress

- Strategic plans should be reviewed and revised regularly
 - Establish a process for monitoring implementation and evaluation of the plan
 - Use QI to improve processes and outcomes
 - Maintain flexibility with the plan as the environment changes
 - Update the plan as needed
 - Communicate successes and results through annual reports and other sharing methods.



Who

Who should be involved

- County-based
 - BOH members - actively involved in the process
 - All department/agency staff (not just management staff) - actively involved in the process
 - BOS members - findings are shared with BOS members
- Health system- based or other
 - Governing entity/administration - actively involved in the process
 - All department/agency staff (not just management staff) - actively involved in the process
 - BOH members - input may be requested by members; findings are shared with BOS members
 - BOS members - findings are shared with BOS members

Strategic Planning & Other Operational Functions



Sharing with funders and decision makers

- Your CHNA & HIP and your strategic plan makes the business case for an investment in public health.



Resources

- NACCHO Strategic Planning Guide
- Strategic Planning Guide- Guidance and Resources to Assist State and Territorial Health Agencies in Developing a Strategic Plan. ASTHO
- What Can I Do to Advance Health Equity? Practice Using A Health Equity Lens! Minnesota Department of Health .




