Agenda & Objectives

- Introductions and Expectations
- Review of Strategic Planning and Organizational Assessment processes
- Review Mission and Visions
- Strategic Challenges / Advantages
- Establish Core Competencies (Organizational)
- Org. Assessment – strengths and opportunities
- Identify Priorities
- Next steps and wrap-up
Expectations: What expectations do you have for this session?

Strategic Planning

Addresses:
- Strategic & action planning
- Plans implementation
- Adequate resources are ensured for plans
- Accomplishments are measured and sustained
- How plans are changed if circumstances require

Stresses:
- Long-term sustainability
- Competitive or collaborative environment
- Core competencies
- Sustainability
Strategic Planning continued...

While many organizations are increasingly adept at strategic planning, plan execution is still a significant challenge. This is especially true given market demands to be agile and to be prepared for unexpected change, such as volatile economic conditions or disruptive technologies that can upset an otherwise fast-paced but more predictable marketplace.

Strategic Planning Outcomes

The special role of strategic planning is to align work systems and learning initiatives with your organization’s strategic directions.

Thereby ensuring that improvement and learning prepare you for and reinforce organizational priorities and achievement.

Assist in tracking successes and achievements with measurements.
Organizational Assessments

- Patient-focused excellence
- Focus on drivers of customer engagement, customer health status, new markets, and market share
- Key factors in competitiveness and sustainability
- Operational performance improvement
- Innovation
- Short- and longer-term productivity and growth
- Cost containment
- Building operational capability (speed, responsiveness, & flexibility)
- Investment in strengthening your organization
- Organizational and personal learning

Performance Excellence Framework: A Systems Perspective

Performance Excellence: An integrated approach to organizational performance management that results in delivery of ever-improving value to customers, contributing to marketplace success, improvement of overall organizational effectiveness, capabilities, and organizational and personal learning.
Steps Toward a Mature Process Approach

(1) Reacting to Problems
(2) Early Systematic Approach

(3) Aligned Approach
(4) Integrated Approach

Plan

Mission (top-level)
1.0

Strategy/Objective
1.1

Strategy/Objective
1.2

Strategy
1.2.1

Tactic
1.2.1.1

Tactic
1.2.1.2
Mission and Vision

Mission
The term “mission” refers to the overall function of an organization. The mission answers the question, “What is this organization attempting to accomplish?” The mission might define patients, stakeholders, or markets served; distinctive or core business; or technologies used.

Vision
The term “vision” refers to the desired future state of your organization. The vision describes where the organization is headed, what it intends to be, or how it wishes to be perceived in the future.

Strategic Advantages & Challenges

- Brainstorm your Advantages & Challenges
- Report your top two Advantages
- Report your top two Challenges
Core Competencies

- Review and establish a list of key Core Competencies
  - Report your top two Core Competencies

Organizational Assessment

1. Leadership
2. Strategic Planning
3. Client / Customer Focus
4. Measurement, Analysis, & Knowledge Management
5. Workforce Focus
6. Process Management and Improvement
7. Results
Top Strategic Initiatives

- Identify Initiatives for your Category
  - Top 2 Strengths (total of 12)
  - Top 2 Opportunities (total of 12)
  - Write on Flip Chart
- Keep in mind *themes* that are:
  - Cross-cutting
  - Significant to organization (challenges/advantages)
  - Related to Core Competencies
  - Related to current Strategic Plan
  - Related to current Quality Initiatives

Priorities for Improvement

- Top 5-6 Opportunities for Improvement
  - Tool: Multi Vote or NGT
- Determine drivers of these Opportunities
  - Tools: Inter-relationship Diagram or
- Benchmark best practices in the room
Next Steps

- Use as input to Strategic Planning
  - Use Strengths & Strategic Advantages
  - Address the Opportunities & Strategic Challenges
- Build Operational priorities (action plan)
  - Top Opportunities are Objectives
  - Select Strategies for improvement (Can use sub-strategies as needed)
  - Cascade into tactics (detailed action plans with measurements)
Definitions

- **Objective**
  - Represents an aim, goal, or desired outcome.
  - Defines a goal for supporting strategies to meet
- **Strategy – Organizational**
  - A method for achieving an objective
  - Levels of detail between the top-level objective and the tactics
  - Sub-Strategies – at the departmental level
- **Tactics (& Measures)**
  - Define how you will implement the most detailed strategies.
  - Often at the departmental level

Plan

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Mission (top-level)
   1.0

Strategy/Objective 1.1

Strategy/Objective 1.2

Strategy 1.2.1

Tactic 1.2.1.1

Tactic 1.2.1.2
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Actions for 2012

- Review today’s output – “Sanity Check”
- Application for ongoing assessment
- Call for assistance

Resources

Iowa Quality Center and Iowa Recognition for Performance Excellence (IRPE)
Iowa Counties Public Health Association,
Iowa Department of Public Health
Iowa Public Health Association
University of Iowa – Upper Midwest Public Health Training Consortium
Contact:
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