



OUR SIX-STEP APPROACH TO STRATEGIC PLANNING

1

DETERMINE THE PLAN-TO-PLAN

Preparation Leading to the Strategic Planning Process.

This is the preparation leading up to the facilitation process. These services include the development of the tentative timeline, communication planning, board (or board committee) role, and assistance with identifying the Strategic Planning Team and communicating their responsibilities.

2

REVIEW THE DATA

Collect and Review the Available Data.

Data may include the most recent needs assessment, market characteristics, UDS reports, UDS Mapper, key clinical measures, financial measures, patients satisfaction results, employee and provider satisfaction results, and any other data available to the health center.

3

COMMUNITY INPUT & ENGAGEMENT

Obtain Community Perspectives on Strategic Directions.

A focus group is held with community stakeholders (1-2 groups depending on service area size) including collaborative partners, safety-net organizations, business community members, elected officials and other community leaders. Phone interviews will be conducted with 5 key donors, if applicable.

4

STRATEGIC PLANNING KICK-OFF

Strategic Planning Workshop.

Agenda: 1) Mission, Vision & Values, 2) SWOT & PEST analysis & review critical needs & issues, 3) Review of data, stakeholder perceptions, 4) Development of strategic goals in key areas, and begin to identify strategies to accomplish the goals, 5) Identify teams in each strategic goal area and assign "homework" to create action plans that emphasize measurements & accountability.

5

FINE-TUNE GOALS, STRATEGIES & ACTIONS

Finalize the Plan.

During a series of meetings utilizing a web virtual-meeting format, the Strategic Planning Team will finalize goals, strategies and action plans. Action plans will be stored in the document sharing system which allows for real-time updating. The frequency of meetings is to be determined, however plans can usually be finalized within 3 meetings.

6

APPROVAL & LAUNCH!

Approval, Communication –The "Living" document!

The Strategic Plan and Action Plan is submitted to the Board for approval. The health center's priorities for communication, target audiences, and staff assignments are determined. Feedback is provided to stakeholders to secure their commitment to advocate for the health center and its plans.

