



Developing Your Game Plan

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What is a Strategic Plan?

“A strategic plan is a tool that provides guidance in fulfilling a mission with maximum efficiency and impact.”

-TCC Group

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Why Plan?

- Critical component of good management and governance
- Helps assure that an organization remains relevant and responsive to the needs of its community
- Contributes to the organization's stability and growth
- Facilitates existing program analysis
- Facilitates new program development
- Provides a basis for monitoring progress and for assessing results and impact

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When/How Often to Engage in Strategic Planning

- Every THREE years if:
 - your organization is new
 - you haven't formally conducted strategic planning
 - you haven't conducted it in quite some time
- After that, can conduct every FIVE years
- Check the plan at least annually
- Document the plan AND the process, for improvement

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Who Should Be Involved?

- Conducted by a planning TEAM
- Led by organization's president or board chair
- Be sure to include:
 - current leader, past leaders, future leaders
 - your DVS
 - other representative(s) from hospital
 - other members of your Partners group
- If there is any doubt – INCLUDE them!
- Members who are committed and willing to devote the time

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Need a Facilitator?

You may want to consider using an outside facilitator if:

- First time with strategic planning
- Previous SP efforts not deemed to be successful.
- Wide range of ideas/concerns among members about SP
- Need to address current organizational issues in the plan.
- Inside facilitator may inhibit participation from others
- Inside facilitator can't fully participate in planning
- Want objective voice

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Three Main Parts to Strategy Development

- Strategic Thinking
 - *Analyze the information you have*
- Strategic Decision Making
 - *Choose the strategies to pursue*
- Strategic Planning
 - *Implementation and action*

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Strategic Thinking

Step One: An Environmental Scan

SWOT Analysis

S = Strengths

W = Weaknesses

O = Opportunities

T = Threats

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Identify Critical Success Factors

- After you assess your strengths/weaknesses
- Factors necessary for continued success
- Using ‘reverse logic’ often works



Strategic Decision Making

Step Two: Set the Strategic Direction

- Identify key issues
- Determine the overall accomplishments the organization should achieve
- Determine the overall methods/strategies to achieve them



Define or Review Your Vision, Mission and Values

Vision: the desired or intended future state of an organization; should describe why its important to achieve the mission

Mission: the fundamental purpose of an organization; it should answer the questions “Why do we exist?” and “What, at the most basic level, do we do?”

Values Statement: the principles on which a organization is built and that guide its culture and priorities

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Strategic Planning: Clear Priorities and an Implementation Plan

- Organized description of activities needed to fulfill desired aim
- To develop a “workable” SP means dissecting the org’s objectives and strategies and prioritizing them.
- When you focus on developing new ideas without prioritizing them, the task of implementation becomes overwhelming and goals are rarely achieved.



Develop SMART Goals

All goals should be SMART:

S =	Specific
M =	Measurable
A =	Achievable
R =	Relevant
T =	Time-bound



Develop Actions Plans

- Determine the resources needed
- Identify people to take the lead and secondary responsibilities
- Determine the measure of success
- Develop a timeline



Written Summary of Results and Decisions of the Process

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Sample

Goal #1: Recruit 100 new volunteers by 2016

Action Step	Resources Required	Lead	2nd	Measure of Success	Comments/ Updates	Timeline
Recruit 50 brand new volunteers	Hospital display booth to use at May community fair 100 Brochures	Karen	Barry	50 new volunteers completed orientation by 12/15/15	Only those who never previously volunteered at the hospital	By 12/15/15
Recruit 50 previous volunteers, but haven't in past 12 months	Report from DVS of inactive volunteers 75 brochures	Sarah	Keith	50 inactive volunteers moved to the active list by 12/15/15		By 12/15/15

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Build in Procedures for Monitoring Progress and Modifying Strategies

The KEY: Patience, Patience, Patience

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Most Important to Remember

- There is no ‘perfect’ plan.
- The real benefit is the process, not the plan document.
- In planning, things usually aren’t as bad as you fear, nor as good as you’d like.
- Use the plan as a compass, but not an inflexible blueprint for action.
- Start simple, but start!

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