



# STRATEGIC PLANNING WORKBOOK OVERVIEW

JANUARY 30, 2019  
3PM EASTERN

# STAR<sup>2</sup> CENTER

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# TODAY'S SPEAKER

- Pamela Byrnes, PhD
  - Senior Consultant
  - John Snow, Inc.

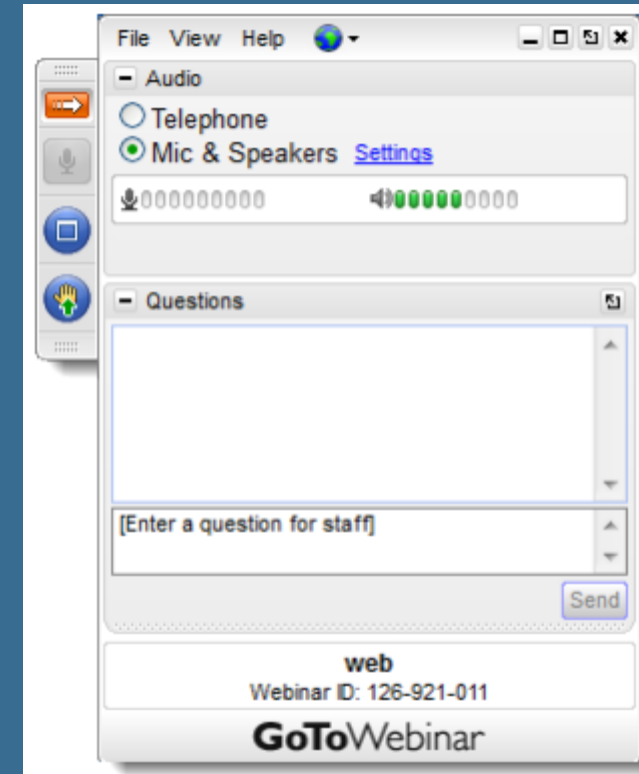
# WEBINAR HOUSEKEEPING

We are  
Recording

Ask  
Questions

Have Fun

- Questions?
  - Raise your hand
  - Use the chat & questions boxes
  - Email [mblake@clinicians.org](mailto:mblake@clinicians.org)



# STRATEGIC PLANNING



# STRATEGIC PLANNING – WHAT IS IT AND WHY DO IT

- **“*Strategic Planning* is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it, with a focus on the future.”\***
- **Responsive – what will the community need?**
- **Reality-Oriented – what is our status and what is the environment?**
- **Ready – what do we need to avoid crisis-driven actions?**

\*From non-profit support center, [www.nonprofits.org](http://www.nonprofits.org), January 18, 2005, adapted from Bryson’s Strategic Planning in Public and Nonprofit Organizations

# STRATEGIC PLANNING: UNDERSTANDING INTERNAL AND EXTERNAL FACTORS TO ACHIEVE YOUR GOALS

## Internal Factors

Mission, Vision, Goals  
Patient Experience  
Present Scope  
Workforce



## External Factors

Population Trends  
Policy/Payment Trends  
Workforce Trends



# STRATEGIC PLANNING: OUR APPROACH

- **Define the factor**
- **Collect and analyze the data**
- **Discuss the options**
- **Make a plan**

# STRATEGIC PLANNING: OUR APPROACH

**Before you begin to complete this workbook** review and/or complete the following STAR<sup>2</sup> Center companion resources:

- [Self-Assessment Tool](#)
- [Retention & Recruitment Plan Template](#)
- [Financial Assessment Tool](#)
- [Data Profile](#)

# INTERNAL ASSESSMENT: MISSION, VISION, GOALS

**Because if you don't know where you are going  
any road will get you there!!**

- **Assess** where you are
- **Analyze** your workforce challenges and strengths in relation to mission, vision, values
- **Discuss** how to best align your workforce to support mission, vision, and goals
- **Develop** a model of the future

# INTERNAL ASSESSMENT: PATIENT EXPERIENCE

- **Assess** where you are
  - **Quantitative Data:** Patient satisfaction surveys, patient trending
  - **Qualitative Data:** Why do patients stay? Why do they leave? What do they like? What don't they like?
- **Analyze** workforce challenges and strengths in relation to the patient experience
- **Discuss** how this information informs workforce planning

# INTERNAL ASSESSMENT: PRESENT SCOPE

- **Assess** where you are: Projected patients and visits

Service Type	Projected Pts	Actual Pts	Projected Visits	Actual Visits
Primary Care				
Behavioral				
Dental				
Other				

- **Discuss** where there are problems – is it staffing or something else?

# INTERNAL ASSESSMENT: PRESENT SCOPE

- **Assess** where you are: **Demand versus capacity:**

Service Type	Site A	Site B	Site C	Site D	Site E	Site F	Site G
Primary Care							
Behavioral							
Dental							
Other							

- **Discuss** where there are problems – is it staffing or something else?
- **Develop** “ideal” staffing to align with scope
- **Plan** how to meet the needs

# INTERNAL ASSESSMENT: PRESENT WORKFORCE

- **Assess** the present status of your workforce
- **Analyze** strengths and challenges in meeting organizational needs
- **Discuss** what the priority areas are and what resources and strategies are needed to ensure adequate and stable workforce

# EXTERNAL ASSESSMENT: POPULATION TRENDS

- **Assess** the Environment: Present and Trends
  - Population socio-demographics
  - Health status indicators
  - Service area provider characteristic
- **Analyze** what workforce will be needed to address the changing needs in the community
- **Discuss** the “ideal” staffing profile needed to meet emerging needs, mission/vision, goals



# EXTERNAL ASSESSMENT: POLICY/PAYMENT TRENDS

- **Assess** the Environment: Present and Trends (consult with state/local policy experts, state/regional PCAs and national associations)
  - Policy
  - Resources
  - Reimbursements
  - Delivery system
- **Analyze** how these changes/trends will impact your organization and workforce needs
- **Discuss** what some approaches are that will help in successfully navigating the changing environment as it relates to workforce

# EXTERNAL ASSESSMENT: WORKFORCE TRENDS

- **Assess** the **Workforce Environment**: (consult with state/local policy experts, state/regional PCAs and national associations)
  - **Funding**
  - **Policies**
    - Licensure
    - Scope of practice
    - Others – immigration!! Work visas!!
- **Analyze** use your “ideal” staffing profile and identify the potential impact your organization and workforce needs
- **Discuss** what strategies do you need to employ to ensure you can achieve your “ideal” staffing goals and meet the needs of the community and the goals of your organization

# SUMMARIZE YOUR FINDINGS AND DELIBERATIONS

- **Take a breath and reflect:**
  - **Mission** – are you there? **Why not?** **Vision** – are you heading there? **Goals?**
  - **Patient Experience** – what is working – what isn't
  - **Scope** – patients, services, demand-capacity
  - **Population-Policy-Reimbursement-Workforce** – what are the trends
- **Analyze** what you have learned – think if you need more/different information
- **Discuss** the salient issues and develop a plan...

## SECTION III: DEVELOPING THE WORKFORCE STRATEGIC MATRIX AND ACTION PLAN

**Step 1:** Fill in the matrix below based on the summary of your assessments and discussions. Focus on workforce issues as they relate to each of the areas covered in this tool. The result will inform the action steps needed to move your organization toward achieving your goals and vision.

**Matrix for Workforce Strategic Planning**

	Strengths	Challenges	Projected Workforce Need
Mission			
Patient Experience			
Present Commitments			
Community Context			
Environmental Context			
Goals-Vision Vision			

**Step 2: Based on the Projected Workforce Needs identified in the matrix above develop a concrete, time framed Action Plan.**

	Projected Workforce Need	Action Step	Resources Needed	Lead	Timeline	Evaluation/Outcome
Mission						
Patient Experience						
Present Commitments						
Community Context						
Environmental Context						
Goals-Vision Vision						

*Remember a strategic plan is a dynamic tool. It changes as the internal and external contexts of the organization change. It should be a roadmap to the future that is used as a constant guide by which to measure the health center's progress moving forward into the future.*

# STAY IN TOUCH!

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THANK YOU!