

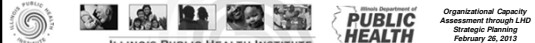
**Organizational Capacity Assessment
Through LHD Strategic Planning**

February 26, 2013, 1:30pm – 3pm Central

THANK YOU FOR JOINING US

Please stay tuned and the webinar will begin on time.
Please note that you will be placed on mute for some of this session. You may use the chat dialogue box at any time to contact IPHI staff.


This session will be recorded and available at:
IPHI's website: www.iphionline.org



**Organizational Capacity Assessment
Through LHD Strategic Planning**

Sponsored by:
*The Illinois Department of Public Health
and
Illinois Public Health Institute
Center for Community Capacity Development*

February 26, 2013




Questions?

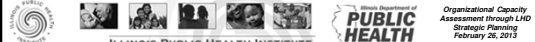
Maximize or minimize side bar →

Raise hand option →

Submit questions here →




We'll take live questions at this time. Please **use the raise hand option** to be un-muted, or submit a question via the **chat feature**.



Laurie Call
Director,
Center for Community Capacity Development
Illinois Public Health Institute


Laurie_Call@iphonline.org



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Learning Objectives


1. Describe how a strategic plan meets IPLAN Organizational Capacity Assessment requirements.
2. Identify the PHAB requirements for a strategic plan.
3. Discuss the relationship between IPLAN, a strategic plan and a Quality Improvement Plan.
4. Describe the steps in a strategic planning process.



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Learning Objectives

4. Identify resources, including data and information, necessary to conduct strategic planning.
5. Select tools and resources for use in completing a strategic planning process.
6. Describe how to align a local health department strategic plan with other state and national plans.



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IPLAN Requirements


IPLAN –
3 Parts

Community Health Needs Assessment

Community Health Plan

Organizational Capacity Assessment


Certified Local Health Department 77 ill. Adm. Code 600.400

Organizational Capacity Assessment through LHD Strategic Planning February 26, 20137

The process for developing an assessment of **organizational capacity** shall address:

- the internal capabilities of the local health department to conduct effective public health functions, including an assessment of operational authority, community relations, information systems, and program management; or
- **an organizational strategic plan developed within the previous five years that assesses strengths, weaknesses, opportunities and threats in the local health jurisdiction**

Certified Local Health Department 77 ill. Adm. Code 600.410


Organizational Capacity Assessment through LHD Strategic Planning February 26, 20138

Poll Question 1

How has your LHD met the Organizational Capacity Assessment requirement?

1. APEX-PH Organizational Capacity Assessment
2. Local Public Health System Assessment with Optional LHD Questions
3. LHD Strategic Plan
4. Other

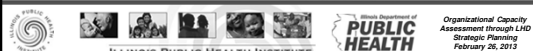
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Organizational Capacity Assessment through LHD Strategic Planning February 26, 20139

PHAB Standard 5.3 Develop and Implement a Health Department Organizational Strategic Plan

Strategic planning is a process for defining and determining an organization's roles, priorities, and direction over three to five years. A strategic plan sets forth what an organization plans to achieve, how it will achieve it, and how it will know if it has achieved it. The strategic plan provides a guide for making decisions on allocating resources and on taking action to pursue strategies and priorities. A health department's strategic plan focuses on the entire health department. Health department programs may have program-specific strategic plans that complement and support the health department's organizational strategic plan.

(PHAB Standards and Measures, Version 1.0)



PHAB Standard 5.3

- 5.3.1 • **Conduct** a Department Strategic Planning Process
- 5.3.2 • **Adopt** a Department Strategic Plan
- 5.3.3 • **Implement** the Department Strategic Plan

(PHAB Standards and Measures, Version 1.0)



5.3.1 A

Conduct a department strategic planning process

1. Description of elements of the planning process used to develop the organization's strategic plan:
 - a. Membership of the strategic planning group
 - b. Strategic planning process steps

(PHAB Standards and Measures, Version 1.0)






5.3.2 A

Adopt a department strategic plan

1. Health department strategic plan dated within the last 5 yrs that includes:
 - a. Mission, vision, guiding principles/values
 - b. Strategic priorities
 - c. Goals and objectives with measurable and time-framed targets
 - d. Identification of external trends, events, or factors that may impact community health or the health department
 - e. Assessment of health department strengths and weaknesses
 - f. Link to the health improvement plan and quality improvement plan

(PHAB Standards and Measures, Version 1.0)




Organizational Capacity
Assessment through LHD
Strategic Planning
February 26, 2013

5.3.3 A

Implement the department strategic plan

1. Annual reports of progress towards goals and objectives contained in the plan, including monitoring and conclusions on progress toward meeting targets

(PHAB Standards and Measures, Version 1.0)




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Assessment through LHD
Strategic Planning
February 26, 2013

What is a strategic plan?

A strategic plan results from a deliberate decision-making process and defines where an organization is going. The plan sets the direction for the organization and, through a common understanding of the mission, vision, goals and objectives, provides a template for all employees and stakeholders to make decisions that move the organization forward.

(Swayne, Duncan, and Ginter. *Strategic Management of Health Care Organizations*. Jossey Bass. New Jersey. 2008).


PHAB Acronyms and Glossary of Terms, Version 1.0

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Strategic Planning
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Poll Question 2
Does your agency have a current strategic plan?

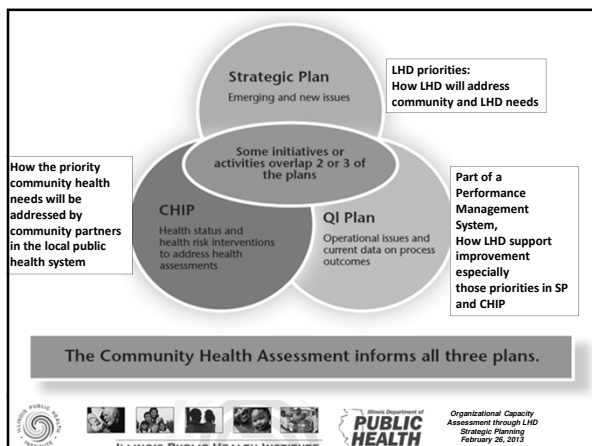
1. Yes
2. Going through the process now
3. No
4. Unsure



PHAB Required Components

- Mission, vision and guiding principles/values for the health department
- Strategic priorities
- Goals and objectives with measurable and time-framed targets
- Identification of external trends, events, or other factors that may impact community health or the health department
- Analysis of the LHD's weaknesses and strengths
- Linkages with the CHIP and the LHD's QI plan
- Members of the Governing Body involved in the process





Poll Question 3
Does your organization have a QI plan?

1. No
2. Unsure
3. We are working on developing a QI plan.
4. Yes, it's rather informal.
5. Yes, it's formalized.

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Organizational Road Map for the Future...


- Creates communication opportunities
- Guides decision-making (direction)
- Establishes some parameters (route)
- Allows for options if needed (detour)
- Establishes priorities (places you must see)

If the organization isn't going to use the plan... why create it?

ILLINOIS PUBLIC HEALTH INSTITUTE PUBLIC HEALTH ORGANIZATIONAL CAPACITY ASSESSMENT THROUGH LHD STRATEGIC PLANNING FEBRUARY 26, 2013

What makes a plan “strategic”?

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



Organizational Capacity Assessment through LHD Strategic Planning February 26, 2013

Strategic Planning Process

Laying the Groundwork


- Identifying and Defining Stakeholders
- Determining Available Data
- Developing Process and Timeline Needs
- Developing a Project Plan

Developing Mission, Vision and Values

- Identifying Formal and Informal Mandates
- Determining Type and Level of Stakeholder Engagement
- Developing Organizational Values Statements
- Developing Vision Statement
- Communicating Vision, Mission and Values

Compiling Relevant Information: Environmental Scan

- Determining Value of Data
- Collecting Additional Data/Information as Needed
- Summarizing Data/Information



Organizational Capacity Assessment through LHD Strategic Planning February 26, 2013 23

Analyzing Results and Selecting Strategic Priorities


- Completing a SWOT/SWOC Analysis
- Identifying and Framing Cross-cutting Themes, Emerging Issues and Key Strategic issues
- Prioritizing and Selecting Strategic Issues

Developing the Strategic Plan and Implementation Plan

- Developing Strategies to Address Priorities
- Developing Goals and Objectives
- Developing Strategic Implementation Plan with Timelines and Measurement Plans
- Creating a Strategic Planning Document

Implementing, Monitoring and Revising as Necessary


- Establishing a Process for Implementing, Monitoring and Revising
- Using QI to Improve
- Maintaining Flexibility
- Communicating Results
- Revising and Updating the Plan as Needed



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Laying the Groundwork

- Identifying and Defining Stakeholders
- Determining Available Data
- Developing Process and Timeline Needs
- Developing a Project Plan




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Who needs to be involved in strategic planning?

- Who are your stakeholders?
 - *Who has a direct interest, involvement or investment in your organization?*
 - *Who can stake a claim on your organization's resources, attention, output or is affected by its outputs?*
- Internal
- External

PHAB Requires Participation of Governing Body

- Do they need involved in strategic planning?
- What role do they play?




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Poll Question 4

How likely is it that representatives from your Governing Body would actively participate?


1. Very unlikely
2. Unlikely
3. Not sure
4. Likely
5. Very Likely



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Determining Available Data


- LHD Annual reports, particularly results related to progress on any past initiatives or strategic plans
- Community Health Assessment (CHA) results such as health status data, community perceptions regarding health and health needs, and demographic information
- An agency review against national standards, such as those of PHAB
- Local Public Health System Assessment (LPHSA) results
- LHD Financial Analysis
- Employee/Workforce climate survey results or feedback
- Partnership or stakeholder analysis results
- Policy and legislative scan
- LHD program evaluation and QI results
- Customer service/ satisfaction feedback
- Results of a traditional SWOT analysis previously completed
- Competitive or market analysis
- Other relevant information and data _____



Data Compilation Plan

Data Readily Accessible	Data to Compile	Data to Collect <i>List possible ways to collect data and expected time to complete.</i>


How does this impact your timeline?



Organizing the Process


- Whose plan is it?
- What period of time will the plan cover?
- Who is the plan's sponsor(s)?
- Who is the plan's champion(s)?
- Who will be on the project planning committee?
- Who do we need to engage in the process and how?
- Who will be on the strategic planning committee to develop the plan?
- What data/inputs do we have vs. what we need?
- Who should review the plan before adoption?
- Who are audiences for the plan?
- How much time are we willing to give to the process?

Adapted from Bryson and Alston, 2005.




Process Choices	Factors to Consider
Abbreviated Process One- or two-day retreat	Extent of external data to be gathered: usually none Amount of discussion needed about key issues: little
Abbreviated Plus Process One- or two-day retreat with additional follow-up meetings	Extent of external data to be gathered: minimal or none Amount of discussion needed about key issues: abbreviated
Moderate Process One to three months	Extent of external data to be gathered: some Amount of discussion needed about key issues: moderate
Moderate to Extensive Process (Three to six months)	Extent of external data to be gathered: moderate Amount of discussion needed about key issues: moderate to extensive
Extensive Process (Six to nine months)	Extent of external data to be gathered: extensive Amount of discussion needed about key issues: extensive

(Allison and Kaye, 2007)

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Developing Mission, Vision and Values

- Identifying Formal and Informal Mandates
- Determining Type and Level of Stakeholder Engagement
- Developing Organizational Values Statements
- Developing Vision Statement
- Communicating Vision, Mission and Values

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Organizational Values

- Principles, beliefs or underlying assumptions that guide the organization.

VALUES OR GUIDING PRINCIPLES

Values are the principles, beliefs and underlying assumptions that guide the organization. They serve as foundational principles for the agency in regards to what the organization is about, its priorities and how the work of the organization is carried out through staff.


- What are the fundamental values and beliefs that guide us in our day-to-day interactions with each other and our constituencies?
- What do we believe?
- What do we stand for?

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Sample Values

- Here are some values words that can help in thinking about this:

accountability empathy loyalty accuracy
 empowerment optimism collaboration
 Equality Persistence courage transparency
 equity quality credibility excellence
 respect dignity wisdom flexibility
 responsibility diversity honesty service
 effectiveness innovativeness timeliness
 efficiency integrity




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Values: Principles, beliefs or underlying assumptions that guide the organization.

- Collaboration:** We work together for the mutual benefit of the community through the sharing of information, resources and ideas to achieve a common goal.
- Excellence:** We strive to provide the highest quality services through individual efforts and teamwork.
- Innovation:** We creatively apply the most advanced technology, information and research to be a revolutionary leader in public health.
- Integrity:** We act with a consistency of character and are accountable for our actions.
- Respect:** We approach all people with significance, understanding, compassion and dignity.
- Service:** We responsibly deliver our exceptional and comprehensive programs with a highly skilled workforce

Northern Kentucky Independent Health District Department




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Organizational Mission


- The organization's purpose; what it does and why

MISSION STATEMENT
 An organization's mission is a statement of its basic purpose or reason for existence. In its most simple form, the mission of a non-profit organization describes:

Impact: What you want to achieve in the long run
Audience: With whom – the target group or beneficiaries of your work
Methods: How you reach the audience and achieve the impact




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Vision

- Futuristic view regarding the ideal state or conditions that the organization aspires to change or create

VISION STATEMENT
 What is the organization's realistic but challenging guiding vision of success? Describe how the community would be improved, changed or different if your organization was successful in achieving its purpose. Describe how the organization would be different as well.




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Mission: The organization's purpose; what is does and why

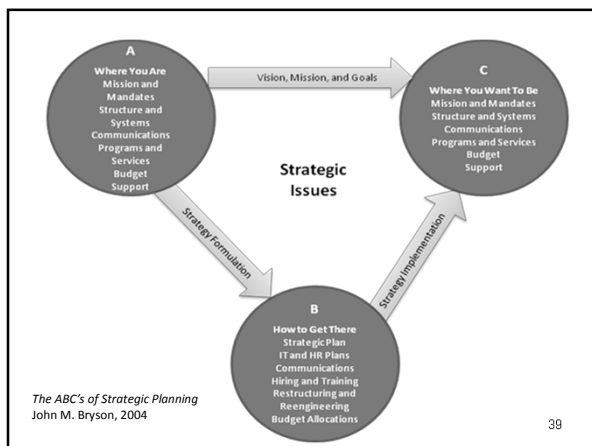
- *To promote, protect and assure conditions for optimal health for residents of Madison County through leadership, partnership, prevention and response.*
 (Madison County Health Department, Illinois)

Vision: Futuristic view regarding the ideal state or conditions that the organization aspires to change or create.

- *The Northern Kentucky Health Department will be a nationally recognized leader in advancing the health and safety of the community.*
 (Northern Kentucky Independent Health District)





Organizational Capacity Assessment through LHD Strategic Planning February 26, 2013



Poll Question 5

Our organization has a mission, vision and set of values.



- No, not formally.
- Unsure.
- We only have one or two of those items and they have not been updated in a while.
- We only have one or two of these items and they are current.
- We have all 3 and they have not been updated in a while.
- We only have all 3 and they are current.

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Compiling Relevant Information: Environmental Scan



- Determining Value of Data
- Collecting Additional Data/Information as Needed
- Summarizing Data/Information

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Determining Available Data

- LHD Annual reports, particularly results related to progress on any past initiatives or strategic plans
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- Customer service/ satisfaction feedback
- Results of a traditional SWOT analysis previously completed
- Competitive or market analysis
- Other relevant information and data _____

Organizational Capacity Assessment through LHD Strategic Planning February 26, 2013

Perspectives to Include

Community	<ul style="list-style-type: none"> • What is going on in the community the LHD serves? What are the trends, needs and opportunities for change within the community? Are our customers satisfied with our services?
Financial	<ul style="list-style-type: none"> • What is the financial picture within the economic climate? What are the LHD resources, assets and opportunities?
LHD	<ul style="list-style-type: none"> • How is the health department doing? What are the health department's strengths and weaknesses? Are internal processes efficient and meeting needs of the customer (internal or external)?
State and National	<ul style="list-style-type: none"> • What is going on at the state, national and legislative level that may impact the health department or community?
Learning and Growth	<ul style="list-style-type: none"> • What types of learning and growth are important for the health department? What is the current capacity of the health department to do the work needed now and in the future?

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Analyzing Results and Selecting Strategic Priorities

- Completing a SWOT/SWOC Analysis
- Identifying and Framing Cross-cutting Themes, Emerging Issues and Key Strategic issues
- Prioritizing and Selecting Strategic Issues

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SWOT – Strengths, Weaknesses, Opportunities and Threats
SWOC – Strengths, Weaknesses, Opportunities and Challenges

<ul style="list-style-type: none"> • Internal Data • Customer feedback (staff) • Staff surveys, focus groups • Financial information • Self-assessment results • Program evaluation results • Annual reports 	<ul style="list-style-type: none"> • External Data • Competitive/ Market Information • Secondary Data (community health status, demographic etc.) • Customer feedback (community)
--	--

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Strengths (Internal)	Opportunities (External)
We want to maintain and leverage strengths.	We want to invest in opportunities.
Weaknesses (Internal)	Threats or Challenges (External)
We want to minimize weaknesses.	We want to identify threats or challenges that need to be addressed and understand their potential impact.



Analyze Results and Select Strategic Priorities

- Analyze SWOT/SWOC and other data
- Identify and frame cross-cutting themes, emerging issues and key strategic issues

*Which issues are strategic?
Which issues are in the community health plan that the LHD will address?
What does the LHD need to do to prepare for threats and challenges?
What does the LHD need to do to improve weaknesses
What does the LHD need to do to achieve the vision?*

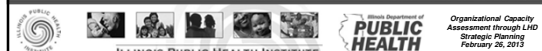
- Prioritize issues for inclusion in strategic plan



Reviewing SWOT/SWOC


- Look for connections between the quadrants.
- Match strengths up with external opportunities.
- Link or offset threats and challenges with opportunities and/or strengths.
- Match weaknesses with strengths that can offset or minimize the weaknesses.
- Look for emergence of patterns or crosscutting themes.

- Continue Analyzing Results
- Ways strengths can be maintained, enhanced or leveraged.
- Ways to minimize weaknesses.
- Options for leveraging or taking advantage of opportunities.
- Potential impact of threat/challenges and anything that can be done to address or prepare for the threat.



Developing the Strategic Plan and Implementation Plan

- Developing Strategies to Address Priorities
- Developing Goals and Objectives
- Developing Strategic Implementation Plan with Timelines and Measurement Plans
- Creating a Strategic Planning Document



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Mintzberg 1992

The Five P's of Strategy

Plan

- Planned and purposeful course of intended action for how to get from one place to another.

Pattern

- Pattern or consistency in actions and behavior over time.

Position


- Position within the context and environment in which the organization operates.

Perspective

- Collective thinking and shared vision/direction by members of the organization

Ploy

- A specific maneuver to outwit or overcome competitors, enemies, etc.



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Linking the Strategic Plan and the IPLAN

The strategic plan must include linkages with the health improvement plan and details on the health department's roles and responsibilities for implementing the health improvement plan. The strategic plan need not link to all elements of the health improvement plan but it must show where linkages are appropriate for effective planning and implementation.


(PHAB Guidance for Measure 5.3.2)

LHD Capacities

SWOT

IPLAN priorities

the LHD will address



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Aligning the Strategic Plan with other Regional, State and National Plans

- Illinois State Health Improvement Plan (SHIP)
- Healthy People 2020

Samples from Florida



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SHIP Vision

Optimal physical, mental and social well-being for all people in Illinois through a high-functioning public health system comprised of active public, private and voluntary partners.

SHIP Public System Priorities

- 1) Improve Access to Health Services
- 2) Enhance Data and Information Technology
- 3) Address Social Determinants of Health and Health Disparities
- 4) Measure, Manage, Improve and Sustain the Public Health System
- 5) Assure a Sufficient Workforce and Human Resources

(note: System Priorities are not listed in priority order)

SHIP Priority Health Concerns

- 1) Alcohol/Tobacco
- 2) Use of Illicit Drugs/Misuse of Legal Drugs
- 3) Mental Health
- 4) Natural and Built Environment
- 5) Obesity: Nutrition and Physical Activity
- 6) Oral Health
- 7) Patient Safety and Quality
- 8) Unintentional Injury
- 9) Violence

(note: Health concerns are not ranked in priority order.)

SHIP Implementation Framework

G Raise Awareness & Engage Partners

O Monitor Activities & Evaluate Outcomes

A State Coordination

L Policy/Advocacy

S

GUIDING PRINCIPLES

PH System Health Equity Innovation
Alignment Statewide

SHIP Priorities

- Access to Care
- Data & Health IT
- Social Determinants
- Measure Manage PH System Workforce
- Alcohol/Tobacco
- Drugs
- Mental Health
- Natural/Built Environment
- Obesity/Nutrition/PA
- Oral Health
- Patient Safety/Quality
- Unintentional injury
- Violence

Developing the Strategic Plan

Goals

Long-range outcome statements that are broad enough to guide the organization's programs, administrative, financial and governance functions. (Allison & Kaye, 2005)

Objectives

Short to intermediate outcome statements that are specifically tied to the goal. Objectives are clear and measurable.

Measure of change, in what, by whom, by when

20% increase in health department nursing staff by January 2014.

SMART objectives

- S – Specific
- M – Measurable
- A – Achievable
- R – Relevant
- T – Time-oriented

Implementing, Monitoring and Revising as Necessary

- Establish a process for monitoring implementation and evaluation
- Use QI to improve process and outcomes
- Maintain flexibility with the plan as the environment changes
- Communicate success and results through annual reports and other methods
- Revise and update the plan as needed

The CHA informs all 3 plans.

Implementation Plans

Priority Improve Staff Retention
Strategy Create a more effective staff review, promotion and compensation system
Goal 1. Develop and implement a performance-improvement focused employee performance review system
Outcome Objective 1A: By December 2013, all employees will have received an annual performance review that focuses on performance against work-plan objectives.


Programs Activities Interventions	Person/Group Responsible	Time-line	Process Indicator	Outcome Indicator
Develop FY2013 annual goals, objectives and performance measures for each employee based on departmental goals and strategic plan	Staff managers Division Directors	April 2012 – June, 2012	1. Program goals and objectives reviewed with each employee 2. Drafts of employee goals, objectives and performance measures that achieve program objectives 3. Division Directors approval of employee performance plans	1. Employees use performance plan to guide their work
Results of 2013 employee goals and objectives reviewed for annual employee performance reviews.	Staff managers Division Directors	June, 2013	1. Measures for all employee goals and objectives with targets compared to results 2. Final performance reviews.	1. Employee annual performance increases linked to achievement of strategic plan goals and objectives.

Components in a Measurement Plan

- Process and outcome indicators
- Data sources for measuring the indicators
- Methods for measurement
- Timing for measurement
- Baseline
- Target

Measurement Plans

No.	Outcome Indicator	Baseline	Target	Monitoring/Data Collection		
				Data Sources	Methods	Timing
1A.	Two qualified nurses added to staff	8 nurses	10 nurses	Resumes and applications Interview comments Reference Checks	File Review	July 2012
No.	Process Indicators			Data Sources	Methods	Timing
1A.1	Widely distributed job posting			Ads and postings online and in print	File Review	March 2012
1A.2	Interview protocol			Interview protocol	File Review	April 2012
1A.3	Qualified pool of candidates for in-person interviews			Matrix of candidates	File Review	May 2012
1A.4	Recommendations for hiring			Matrix of candidates	File Review	June 2012




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Organizational Capacity Assessment through LHD Strategic Planning February 26, 2013

Strategic Planning Document Components

Letter or Introduction
Executive Summary
Mission, Values and Vision
Summary of SWOT/SWOC and Environmental Scan
Summary of Strategic Priorities
Goals and Objectives
Linkage with CHIP and QI Plans
How the Plan Will be Used
Appendices – Documentation of Process, Governing Body Involvement


PHAB Requirements in RED



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Organizational Capacity Assessment through LHD Strategic Planning February 26, 2013

Implementing, Monitoring and Revising as Necessary

- Establishing a Process for Implementing, Monitoring and Revising
- Using QI to Improve
- Maintaining Flexibility
- Communicating Results
- Revising and Updating the Plan as Needed



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Organizational Capacity Assessment through LHD Strategic Planning February 26, 2013

Monitor and Revise as Needed

What makes a plan “strategic”?

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



Communicate Results

- Keep the strategic plan alive and at the forefront.
- Periodically review progress and results in regular internal meetings.
- Apply QI for improvement.
- Report on progress to Governing Body and in Annual Report




Recommended Resources

- *Developing a Local Health Department Strategic Plan: How to Guide* (NACCHO, 2012).
<http://www.naccho.org/topics/infrastructure/accreditation/strategic-plan-how-to.cfm>
- *Strategic Planning for Nonprofit Organizations: A practical guide and workbook* (Allison & Kaye, 2007).
- *Strategic Planning for Public and Nonprofit Organizations: A guide to strengthening and sustaining organizational achievement* (Bryson, 2004).
- *Creating and Implementing Your Strategic Plan: A Workbook for Public and Nonprofit Organizations* (Bryson & Alston, 2004)




Poll Question 6
Please rate the content of this Webinar.


1. Poor
2. Not so good
3. Satisfactory
4. Good
5. Outstanding

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Poll Question 7
Please rate this statement. The
established learning objectives were met.

1. Strongly Disagree
2. Disagree
3. Neither Agree nor Disagree
4. Agree
5. Strongly Agree

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 **Feedback**

- We really NEED to hear from you!
- Please complete the evaluation form.
- Your input is used to plan future offerings.

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Next IPLAN Trainings:

Turning Data into Information, Part 2 - Webinar

Wednesday, March 20, 2013, 1:30 – 3:00pm

Registration is available at: www.iphionline.org



Thank You!

If you have training or technical assistance follow-up needs, contact:

Laurie Call, Director
Center for Community Capacity Development, IPHI
Laurie.Call@iphionline.org