Strategic Plans – The Engine of Performance Management

May 7, 2015

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Susan Ramsey

▸ More than 25 years in public service for the State of Washington retired in 2013, served as the Director for the Office of Performance and Accountability with the Washington State Department of Health.

▸ Past co-chair for the Standards and Accreditation Workgroup for the Public Health Improvement Partnership in Washington State representing the state and 35 local health departments.

▸ National trainer and presenter for performance management, quality planning and improvement and accreditation in more than 10 states and for ASTHO, PHAB, NNPHI, and RWJF.

▸ PHAB site reviewer.

▸ Member of the PHAB Evaluation and Quality Improvement Committee.

▸ Washington State Reviewer and led the State Department of Health to become nationally accredited in 2013.

▸ Owner and Managing Consultant of Pearls of Wisdom Consulting, LLC based in Olympia, WA.

Marlene (Marni) Mason

More than 30 years in private healthcare and public health as clinician, manager and national performance management/quality improvement consultant

- Consultant for Public Health performance standards and improvement since 2000; NACCHO CHA/CHIP project (2011-12), ASTHO QI Demonstration project (2012-13), NNPHI COPPHI QI Coach (Phase I & II) and for all 3 Multistate Learning Collaboratives (2005-2011), including more than 80 QI teams.

- National trainer and presenter for QI and Accreditation in more than 20 states and for ASTHO, NACCHO, NIHB, NNPHI, and RWJF.

- Contributed to the Michigan QI Handbook, the 2009 ASQ Public Health QI Handbook, and authored numerous JPHMP articles including Jan/Feb 2012 *"Understanding and Controlling Variation in Public Health"*.

- Consultant for PHAB Standards Development and training of site reviewers (2008-2010).

- Surveyor for National Committee for Quality Assurance-NCQA (17 years) and Senior Examiner for WA state Quality Award (Baldrige Criteria for Performance Excellence- late 1990s)

- Owner and Managing Consultant of MarMason Consulting, LLC based in Seattle, WA

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Workshop Objectives

- Discuss Strategic Planning processes:
  - Where are we? What do we have to work with? Where do we want to be? And how do we get there?
- Review and discuss the application of the Strategic Planning Guide covering aspects of the process and important tools and resources.
- Develop and understand how to operationalize the Vision, Mission, and Values; Strategic Priority Areas, Goals and Objectives.
- Discuss challenges in implementing the agency strategic plan.

What is Strategic Planning?

Strategic Planning is:

▸ The process of taking facts and building plans to help us achieve our Vision.

▸ A long term look at the organization (2 years +).

▸ Creating measurable objectives, goals, targets and action plans.

▸ Involving the whole organization in the creation and achievement of our plans.

▸ Management review of our successes and failures.

Strategic Planning is NOT:

▸ A dusty old book on the shelf that says "Five Year Plan".

▸ The best kept secret in the organization.

▸ A list of 157 unrelated things we ought to do.

▸ A waste of time.

▸ Something we'll get around to some day.

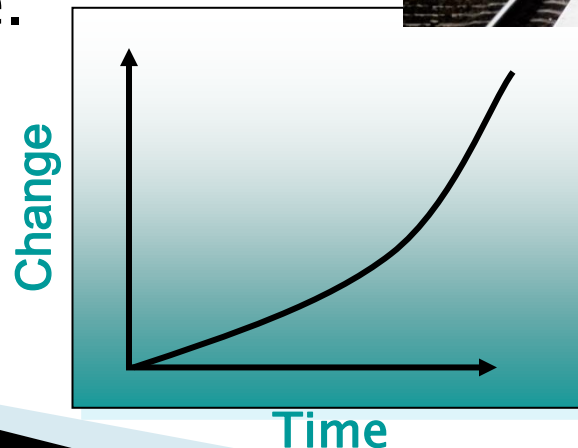# Are We Moving in The Right Direction?

- As an individual,
- As an employee,
- As a leader,
- And what is the right direction anyway?

Four Great Reasons to Plan

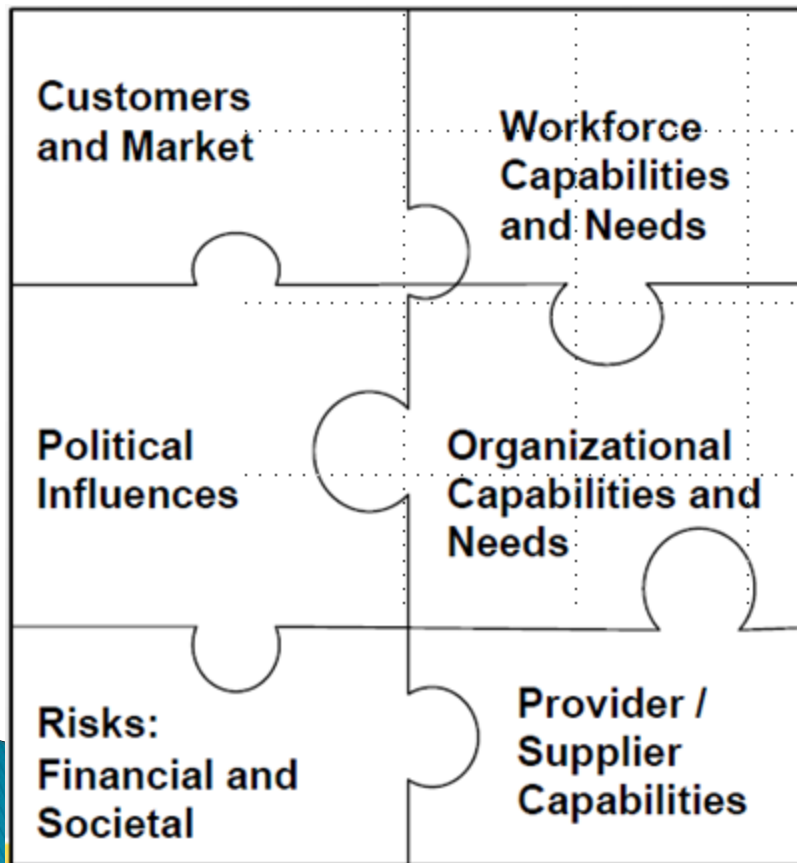1. Saves time and resources.

2. Increases impact of work you are already doing.

1. Fills in gaps.

2. Change.

Change

Time

How are we Going to Create a Strategic Plan?

Take facts describing current conditions and build measurable plans

Environmental Issues/ Opportunities

Customers and Market	**Workforce Capabilities and Needs**
Political Influences	**Organizational Capabilities and Needs**
Risks: Financial and Societal	**Provider / Supplier Capabilities**

Strategic Issues

Balanced Scorecard
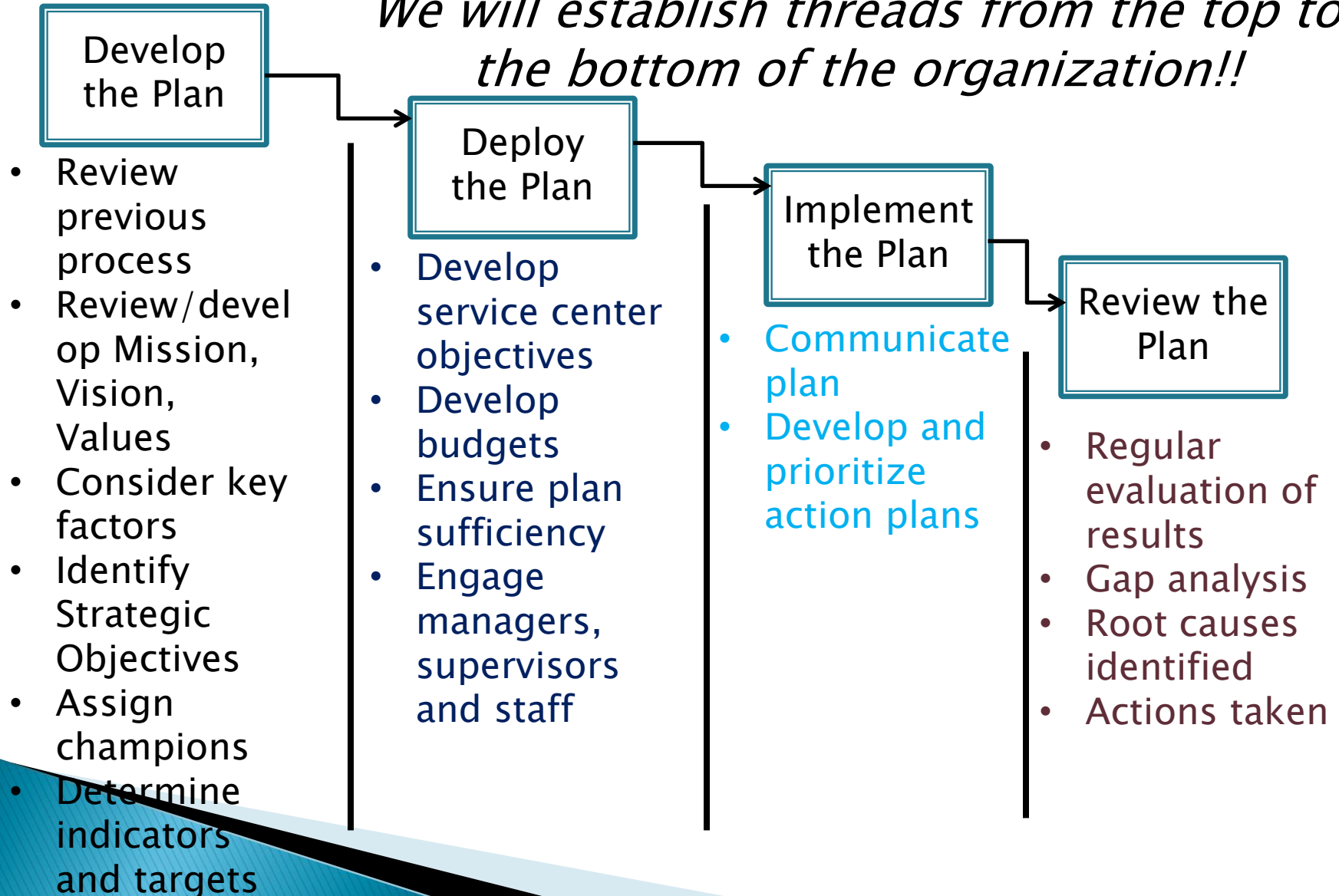
1.0 Health Prevention, Promotion, and Preparedness

2.0 Financial/and Business Excellence

3.0 Customer/Partner Excellence

4.0 Employee Excellence and Personal Responsibility

LAYING THE GROUNDWORK FOR STRATEGIC PLANNING

The Plan for the Plan

We will establish threads from the top to the bottom of the organization!!

Develop the Plan

- Review previous process
- Review/develop Mission, Vision, Values
- Consider key factors
- Identify Strategic Objectives
- Assign champions
- Determine indicators and targets

Deploy the Plan

- Develop service center objectives
- Develop budgets
- Ensure plan sufficiency
- Engage managers, supervisors and staff

Implement the Plan

- Communicate plan
- Develop and prioritize action plans

Review the Plan

- Regular evaluation of results
- Gap analysis
- Root causes identified
- Actions taken

Example Phases of Strategic Planning

- **Phase I – Management Team – Month One**
  - ◦ Develop vision/mission/values/goals
- **Phase II – Management Team – Month Two**
  - Identify objectives to meet goals
  - Identify strategies to achieve objectives
  - Develop accountability links and performance measures to meet objectives
- **Phase III – Stakeholders & Staff– Month Two**
  - ◦ Engage Stakeholders and Partners
- **Phase IV – All Staff – Month Six**
  - Implementation – Chart and track progress quarterly/semi annually
- **Phase V – All Staff – Month 12**
  - ◦ Evaluate and review – What did we accomplish? What do we change/modify?

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Steps of the Strategic Planning Guide 📝

▸ Fill out one step at a time on the worksheet as we work through the sheets.

▸ Don't jump ahead!

▸ You will miss out on key points!

Strategic Planning
Pearls of Wisdom Consulting, LLC 2014

Introduction
This guide is intended to help meet the challenges we face in preparing for the future using strategic planning. It is important to balance the work of meeting our current public health challenges as we prepare to take on the new work that comes our way. And we must be flexible. Unstable funding and shifting state and national priorities requires us to make strategic adjustments along the way. Some of the areas in this guide have used the Washington Department of Health (DOH) examples.

Strategic Planning is the process by which an organization envisions the future and develops goals, strategies, objectives and action plans to achieve that future.

It can sometimes help to identify the things that helped, and hurt, previous planning efforts in order to overcome them next time. List some of the barriers to the strategic planning process that you experienced in the past. Then, list some of the things that aided your success.

BARRIERS	AIDS

Think of ways to avoid the barriers you identified. Determine ways to incorporate these aids to help benefit this strategic planning process.

Internal Stakeholders

Examples may include:
- Governing body members.
- Senior staff.
- Middle managers.
- Front-line staff.
- Union representatives.
- Advisory board/committee members.
- Other _____

External Stakeholders

Examples may include:

- Funders.
- State Health Department or other state agency representatives.
- Coalition members.
- Partner agencies.
- Other health departments (regional or shared service health departments).
- Competitors.
- Clients/customers.
- Community-at-large.
- Special target populations.
- Policy makers (all levels).
- Media representatives.
- Others _____

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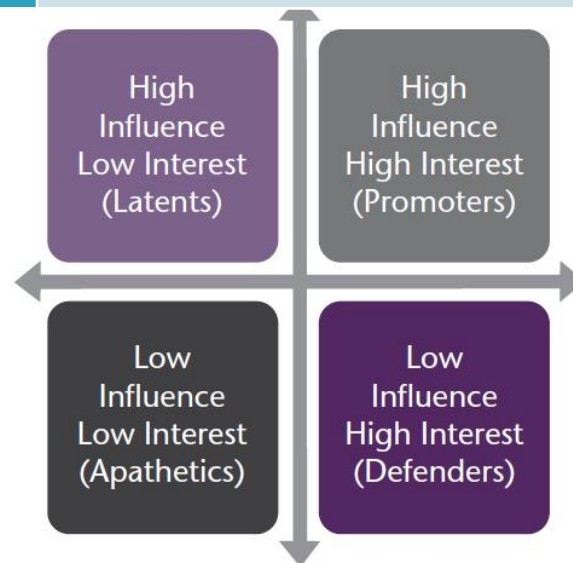
Three Levels of Stakeholders

1. **Primary Stakeholders** are the people or groups that stand to be directly affected by the actions of the agency. For example, if proposing an increased tobacco tax, tobacco users and tobacco suppliers would both be directly affected by the tax through an assumed financial impact.

2. **Secondary Stakeholders** are people or groups that are indirectly affected by the actions of an agency. Secondary stakeholders for a tobacco tax may include those exposed to second-hand smoke and local businesses who perceive a reduction of revenue based on tobacco product sales.

3. **Key Stakeholders**, who might belong to either or neither of the first two groups, are those who can have a positive or negative effect on an effort, or are otherwise important to the effort. Key stakeholders for the tobacco tax include elected officials and advocacy staff and organizations.

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Identifying Stakeholders, Their Role and Influence – Exercise

Stakeholder	Level of Engagement Needed	Action Needed and By When

High Influence Low Interest (Latents)

High Influence High Interest (Promoters)

Low Influence Low Interest (Apathetics)

Low Influence High Interest (Defenders)

10 Stations on the Journey

Station 1: Conduct an Environmental Scan
Station 2: Set/Review Organizational Direction
Station 3: Develop/Revise Strategic Goals, Objectives, and Strategies
Station 4: Develop/Revise Performance Measures
Station 5: Develop/Revise Action Plans
Station 6: Allocate Resources
Station 7: Implement Action Plans
Station 8: Track Progress on Actions
Station 9: Modify Action Plan based on data
Station 10: Evaluate Strategic Planning Process

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All Aboard?

Station 1: Conduct an Environmental Scan

Outcomes:

- Determine the organization's strengths, weaknesses, opportunities and threats.
  - **Market Forces:** An assessment of competition the organization must face, including industry trends and competitive analysis.
  - **Stakeholder Analysis:** Identification of stakeholders and delineation of their needs.
  - **Technology:** An internal and external assessment of technology to find opportunities for potential innovation.
  - **Internal Capability Analysis:** A detailed view of the internal workings of the organization, with a focus on workforce development, communication, financial sustainability, and process capabilities.
  - **Legal and Regulatory Factors:** A view of how the organization can favorably address legal and regulatory factors and minimize any threats by relevant legislation and regulation. A review of regulations that impact/guide your work prior to setting the strategic direction, i.e. – federal laws, statutes, and regulations.

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Strengths   Weaknesses   Opportunities   Threats

Strength: In the here and now . . .
- What are our advantages?
- What is working well?

Weakness: In the here and now . . .
- What could be improved?
- What should be avoided?
- What didn't work?

Opportunity : What might be in the future . . .
- Ways to capitalize on your strengths.
- Changes in technology and markets on both a broad and narrow scale.
- Changes in government policy related to our field.
- Changes in social patterns, population profiles, lifestyle changes, etc.
- Local issues can become opportunities.

Threats: In the future . . .
- What are the barriers in responding to an event better the next time?
- What obstacles do you face?
- Has your role or responsibility changed?

SWOT Analysis

Strength	Weakness
GOOD NOW	BAD NOW
Maintain, Build, Leverage	Remedy, Stop
Opportunity	Threat
GOOD FUTURE	BAD FUTURE
Prioritize, Optimize	Counter

Example SWOT for Capability 3: Emergency Operations Coordination

Strengths	Weaknesses
• Experience in developing and maintaining All-Hazards/Emergency Response Plan • Experience in after action reporting • Data rich • Seen as leaders and innovators • Strong track record	• Uncoordinated approach with subject matter experts • Minimal training provided • Unclear about Duty Officer role and responsibilities and what is needed
Opportunities	**Threats**
• ACA (Health Care reform) • Funding from health reform • Focus on health (care delivery) state and national • Community partners and engagement	• Categorical funding • Reduction of funding • Competing demands • Tough attitude towards public health and health care working together • Eroding state and federal resources

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Example Action Items, Capability 3

Strengths
- Maintain a robust system with effective methods to implement policy and continue to support existing culture of working well with regulated industries and partners.

Weaknesses
- Take initiative to address priority public health issues after consideration of potential risks.

Opportunities
- Proactively pursue a plan to engage policy makers on key public health issues.

Threats
- Improve our ability to identify and communicate cost and benefits of activities.

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Example SWOT for Capability 4: Emergency Public Information and Warning

Strengths	Weaknesses
• Strong public health system • Strong partnerships/relationships • Existing emergency public information system	• Partners inability to participate due to reduced funding • Each community segment doing its own thing
Opportunities	**Threats**
• More engagement with non-traditional partners (planners, transportation, etc.) • Build partnerships to get more done • Learning from successful partnerships	• Less priority in Public Health during economic stresses • Competition for limited resources

Example Action Items: Capability 4

Strengths
- ◦ Strengthen relationships with partners by actively engaging them in development of the PHEPR (outcome = strengthen public health system).

Weaknesses
- ◦ Fully implement the agency on-line meeting system to increase opportunities for partners to participate.

Opportunities
- ◦ Map the environment to include identifying new and different partners and actively engage them.

Threats
- ◦ Identify an issue that crosses multiple disciplines and develop a workgroup with cross-discipline members to address, capture and share best practices.
- ◦ Incentivize cross-discipline activity.

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Short Break!
Be Back in 15 minutes, please!

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Station 2: Set/Review Organizational Direction

Outcomes:

▸ Your defined Vision, Mission and Values focus the energies and resources of your entire organization.

▸ They also serve as a checkpoint to return to whenever you feel yourself going off course.

▸ What the organization will look like in the future.

A Pearl of Wisdom

"If You Don't Know Where You Are Going, Any Path Will Do."

Lewis Carroll

One way to determine the road to better health in our communities is to use criteria to identify the issues we will work on together.

A Vision . . .

. . . is a statement about what your organization wants to become.

. . . should resonate with all members of the organization and help them feel proud, excited, and part of something much bigger than themselves.

. . . should stretch the organization's capabilities and image of itself.

. . . gives share and direction to the organization's future.

. . . visions range in length from a couple of words to several pages.

CAUTION

Visions too often include highly idealistic phrasing and activities which organizations cannot realistically aspire.

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Vision Examples

- A healthy and safe community.
- People enjoy longer and healthier lives because the Department of Health leads changes in policies, systems, and environments that prevent illness and injury, promote healthy communities, and encourage healthy lifestyles.
- The healthiest state in the nation.

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Checklist – Is Our Vision . . .

- ❑ A statement about what we want to become?
- ❑ Going to resonate with all members of the organization and help them feel proud, excited, and part of something much bigger than themselves?
- ❑ Stretch the organization's capabilities and image of itself?
- ❑ A statement that gives shape and direction to our future?
- ❑ Between two words and several pages long?

Mission: Who Are You?

▸ Spreading yourself too thin?

▸ Biting off more than you can chew?

▸ Being all things to all people?

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A Mission . . .

. . . defines why the agency exists.

. . . communicates fundamental values and beliefs to all employees.

. . . identifies core services and who we do them for.

. . . is inspirational and should supply energy and motivation.

. . . is able to be translated into terms that can be understood and acted upon.

. . . declares: Agency Commitment, Focus, Identity.

Checklist – Does Our Mission . .

- ❑ Define why the agency exists?
- ❑ Communicate fundamental values and beliefs to all employees?
- ❑ Identify core services and who we do them for?
- ❑ Provide inspiration and supply energy and motivation?
- ❑ Translate into terms that can be understood and acted upon?
- ❑ Identify the agency's commitment, focus and identity?

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Values . . .

… represent the core priorities in the organization's culture, including what drives members' priorities and how they truly act in the organization.

… drive the intent and direction for "organic" planners.

… well articulated, provide everyone with guiding lights, ways of choosing among competing priorities, and guidelines about how people will work together.

… should take into consideration the values of customers, stakeholders employees and the community.

Establish four to six core values from which the organization would like to operate.

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Value Statement Examples

Accountability	*Be professionally responsible for all actions we take*
Honesty/Integrity	*Conducting all business truthfully and in the best interests of our clients*
Client Centered	*Always striving to meet the needs of those we serve*
Ownership	*Taking responsibility for both individual and team actions*
Collaboration	*All constituents committed to working together with respect and cooperation*
Team Oriented	*Placing the mission and team purpose above self*
Respect	*Working together with mutual respect and cooperation*
Education	*Providing knowledge, tools, and encouragement to all people so that they can make positive, informed decisions resulting in healthy lifestyles and positive health outcomes*
Empathy	*Understanding, respecting, celebrating, and welcoming all people regardless of race, ethnicity, income, gender, age, heritage, or lifestyle*
Cultural Competency	*Understand and do the correct thing based on the culture being served*
Access	*Providing quality comprehensive services that are navigable, accessible, and affordable to all community members*

Checklist – Do Our Values . . .

- Represent the core priorities in the organization's culture, including what drives members' priorities and how they truly act in the organization?

- Drive the intent and direction for "organic" planners?

- Well articulated, provide everyone with guiding lights, ways of choosing among competing priorities, and guidelines about how people will work together?

- Should take into consideration the values of customers, stakeholders employees and the community?

- Establish four to six core values from which the organization would like to operate?

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IDENTIFYING STRATEGIC ISSUES/PRIORITY AREAS

Strategic Issues

- Strategic issues (or Vision Areas, Priority Areas) are **fundamental policy choices** or **critical challenges** that must be addressed in order for a community to achieve its vision.

Priority Setting Tools

- Many tools available:
  - "Qualitative", build consensus, based primarily on perceptions and values (e.g., brainstorming, affinity diagrams, Pareto charts, etc.).
  - "Quantitative", use data (e.g., statistics, scores, indexes, evidence of effectiveness).
- Mixing tools is often recommended.

Criteria for Prioritizing Health Issues

- Size — How many people are affected?
- Seriousness — Deaths, hospitalizations, disability
- Trends — Is it getting worse or better?
- Equity — Are some groups affected more?
- Intervention — Is there a proven strategy?
- Values — Does our community care about it?
- Resources — Build on current work - available $?

Criteria Matrix

Health Issue	Import-ance			Equity			Serious	Size	Effective Actions	Total
	H	M	L	H	M	L				
1. Health Care Access	3				2		5	6	10	26
2. Injury & Violence		2				1	7	3	4	17
3. Chronic Disease	3				2		9	8	3	25
4. Low HS Graduation		2		3			4	6	3	18
5. Alcohol/Drug Use			1			1	8	3	2	15

PUBLIC HEALTH

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Strategic Issues/ Priority Areas

▸ Brainstorm potential strategic issues.
▸ Develop an understanding about why an issue is strategic.
▸ Consolidate overlapping or related issues.
▸ Conduct a prioritization or selection process.
▸ Arrange issues into an ordered list.
▸ Be prepared to share results.

Lunch Break

10 Stations on the Journey

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Station 3: Develop/Revise Strategic Goals, Objectives and Strategies

Outcomes:

▸ *Goals* with broad statements describing a future condition or achievement without being specific about how much and addresses the question: "How do we get there". Goals that focus on outcomes or results and are qualitative in nature in a specific priority area.

▸ *Objectives* to support the goals and are a specific statement of a desired short term condition or achievement that includes a measurable end result to be accomplished within time limits. Objectives that answer the question: "What do we have to do to get there?"

▸ **Strategies** that state methods to achieve Goals and Objectives. They will be indicators of action, the "How to" achieve the Goal or Objective. They will serve to guide budget activities used to achieve Goals.

Goals Should Be Doable

A Goal . . .

… is a broad, organizational intention.

… describes a future condition or achievement.

… focuses on outcomes or results.

… is qualitative in nature, rather than quantitative.

… is not specific about how to achieve the goal.

… is long-term in nature.

Strategic Choices
Incremental Approach

Where you are now

Doable and Measurable Goal (12–18 mos.)

Big, Broad Goal (3–5) years): Where you want to be

| One little engine car on the track | One little engine car on the track with passenger cars | One little engine car on the track with passenger cars and the cars have passengers | We have two engine cars on two tracks | We have six engine cars on the tracks | We've moved up to the big leagues |

Data Summary To Define Goals

Possible summary structures:
1. Organize the data by the five perspectives
   - Community
   - Financial
   - Health department
   - State/national/legislative
   - Learning and growth

2. Organize the data by stakeholder input:
   - Community-at-large
   - Staff members
   - Governing body
   - Funders
   - Customer and others

Analyzing Results From SWOT

Strength	Weakness
GOOD NOW	BAD NOW
Maintain, Build, Leverage	Remedy, Stop
Opportunity	Threat
GOOD FUTURE	BAD FUTURE
Prioritize, Optimize	Counter

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Set Goals

▸ There can be one or several goals for each Priority Area

Example:

Priority Area: Decrease Obesity

Goal #1: Decrease obesity in the County through promoting healthy lifestyles.
Or
Goal #1: Decrease obesity through promoting healthy eating.
Goal #2: Decrease obesity through increasing activity levels of adults and children.

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Identify Strategic Priority Areas

▸ To address weaknesses, opportunities and threats we categorize into buckets and to leverage strengths:

Prevent/Promote/ Prepare	Business/Financial Excellence	Customer/Partner Excellence	Employee Excellence and Personal Resp.

▸ This concept is called a "Balanced Perspective"

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The Balanced Perspective – Public Health

1.0 Prevent/Promote/Prepare	3.0 Customer/Partner Excellence
Goal Statement Objective Measure/Target Strategy Measure/Target	Goal Statement Objective Measure/Target Strategy Measure/Target
2.0 Business/Financial	4.0 Employee Excellence & Personal Resp.
Goal Statement Objective Measure/Target Strategy Measure/Target	Goal Statement Objective Measure/Target Strategy Measure/Target

Are Our Goals . . .

- ❑ Broad organizational intentions?

- ❑ Describing future conditions or achievements?

- ❑ Focused on outcomes or results?

- ❑ Qualitative rather than quantitative?

- ❑ Not specific about how to achieve the goals?

- ❑ Long-term in nature?

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Objectives are SMART

- **S**pecific – specify what is to be achieved, by how much, and by when.
- **M**easurable – make sure that the objective can be measured (i.e., data is or will be available to measure progress).
- **A**chievable – set objectives that are feasible for the agency.
- **R**elevant – align objectives with the mission and vision of the agency.
- **T**ime-oriented – establish a timeframe for achieving the objective.

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Why We Measure Performance?

- Help guide management and decision-making processes.
- Help to align with the department's mission, vision, and strategic directions.
- Provide employees with feedback on the work they are performing.
- Predict future performance.
- Facilitate learning and improvement.

Principles for Performance Measurement

1. Know why you are measuring.
2. Be selective.
3. Let your customers tell you what results to measure.
4. Continually ask how you and your stakeholders are doing.
5. Track the internal processes that produce your results.
6. Tell and show people what you learn.

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Performance Measures Vs. Objectives

Decrease the percent of Best Health County youth ages 11– 19 who are obese from the baseline of 32% to 25% by December 31, 2016.

Direction   Performance measure   Target

Time frame

Let's Discuss

▸ What tools and databases are you using to monitor your performance measures?

▸ Do you link customer needs with process outcomes?

▸ Do you have a systematic process for reporting?

▸ Are staff and managers accountable to review data regularly and take action on the results?
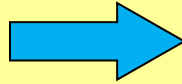
Are Our Objectives . . .

- ❏ Key activities needed to achieve our goals?
- ❏ Measurable?
- ❏ Specific? A clear message as to what needs to be accomplished.
- ❏ Appropriate? Consistent with the vision, mission, and goals.
- ❏ Realistic? An achievable target given the capabilities and opportunities in the environment. In essence, it must be challenging but doable.
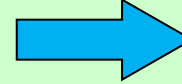- ❏ Timely? Is there a time frame for accomplishing the objective?

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Success can be Measured in Stages

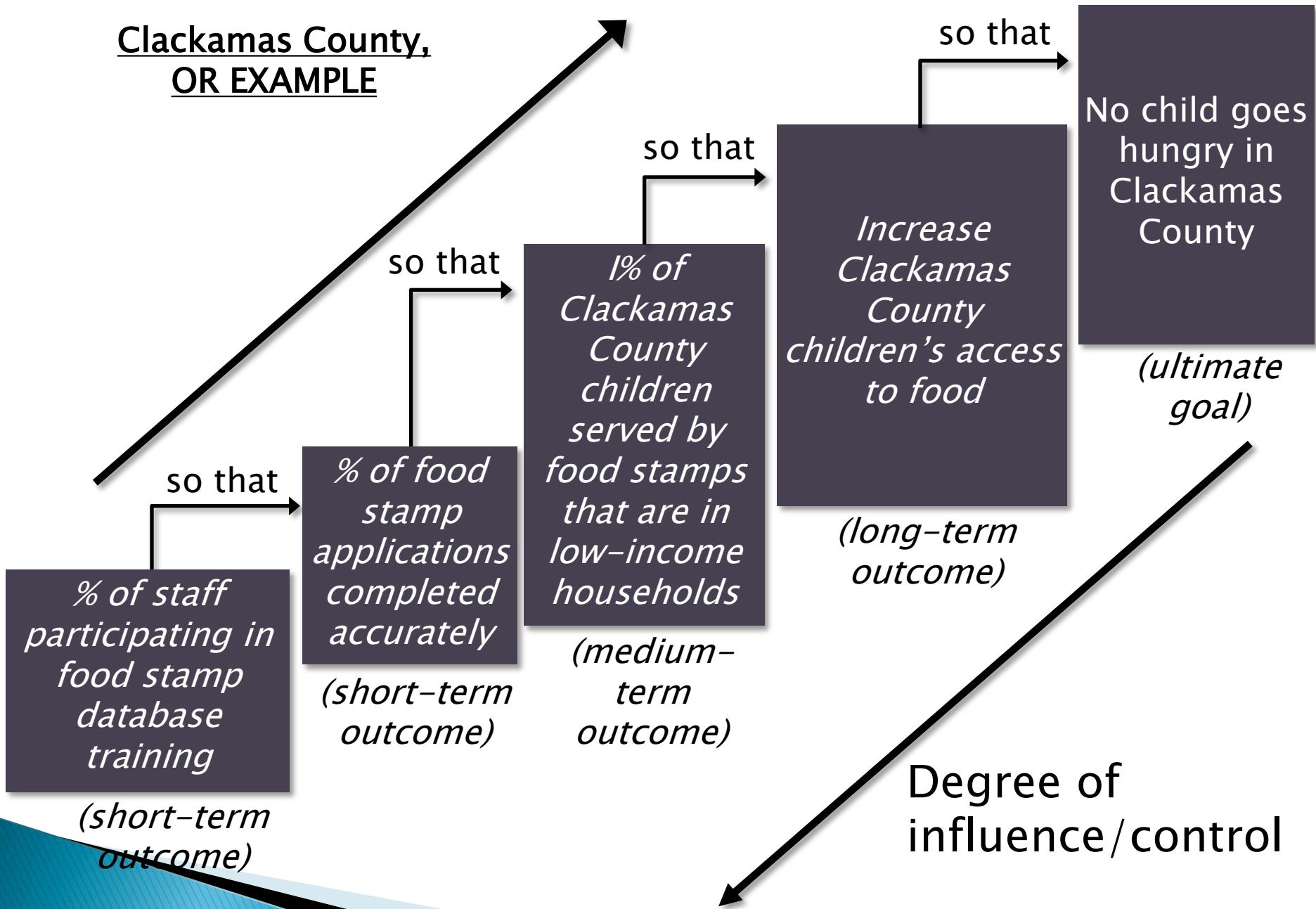| Health Issue/ Goal:	1. Short term **"Process Outcome"**	2. Mid-range **"Results Outcome"**	3. Long term **"Health Status Indicator"**
Improve Childhood immunization rates of 2 year olds	Percent of planned materials distributed to increase provider awareness **(Goal: 100%)** Percent of children with records in the immunization registry **(Goal: increase % from year to year)**	Percent of children 0 to 24 mo. completing the recommended series on time **(Goal: increase %)**	Disease rates related to the series are very low or approaching none (such as Pertussis, measles)

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Line of Sight Framework

▸ How do our day to day job-related activities impact the longer-term health indicators or impact goals of our health department?

▸ Example: "My job is to process food stamp applications so that no child goes hungry in Cook County"

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% of staff participating in food stamp database training

(short-term outcome)

so that

% of food stamp applications completed accurately

(short-term outcome)

so that

1% of Clackamas County children served by food stamps that are in low-income households

(medium-term outcome)

so that

Increase Clackamas County children's access to food

(long-term outcome)

so that

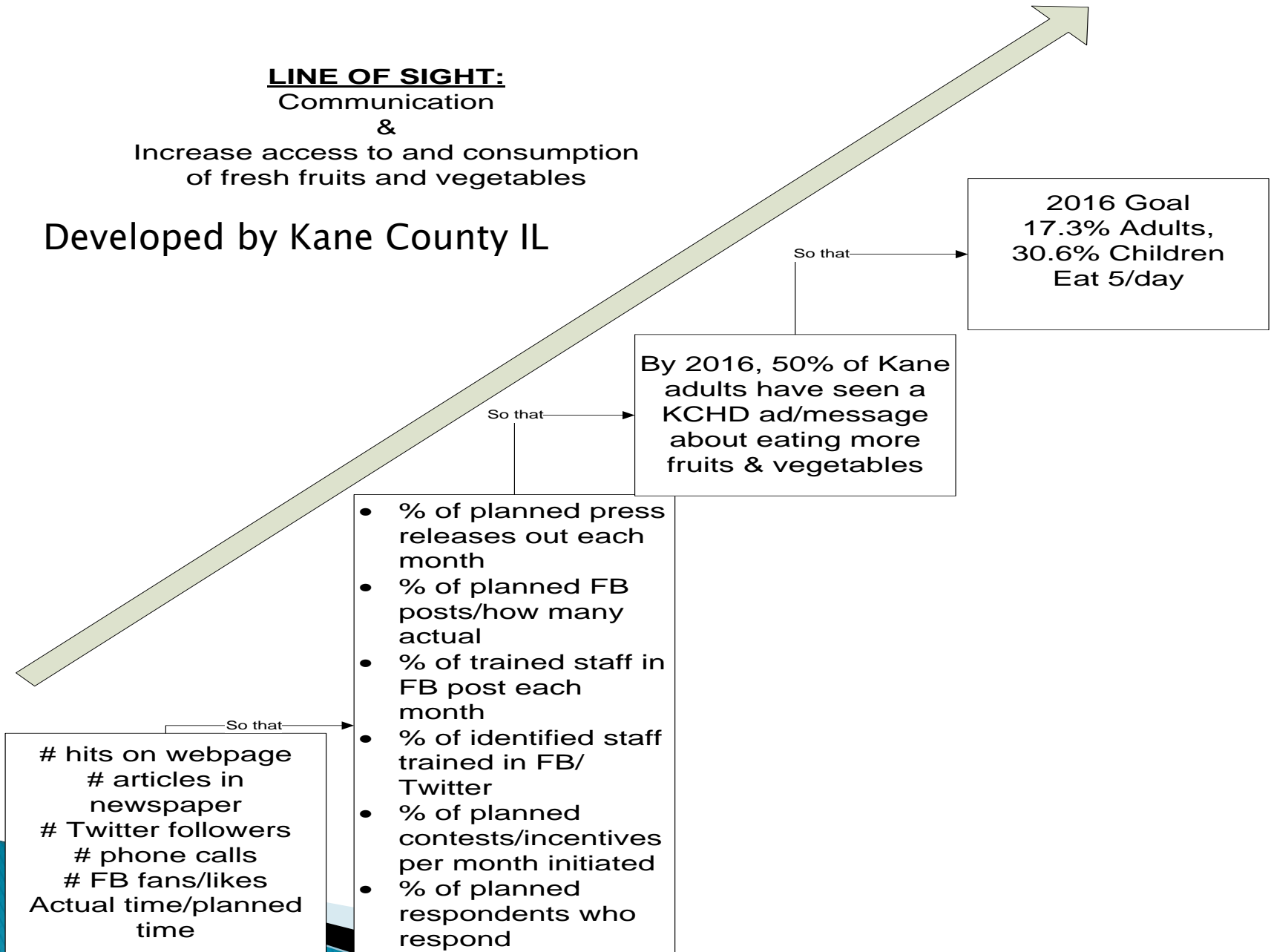No child goes hungry in Clackamas County

(ultimate goal)

Degree of influence/control

LINE OF SIGHT:
Communication
&
Increase access to and consumption
of fresh fruits and vegetables

Developed by Kane County IL

2016 Goal
17.3% Adults,
30.6% Children
Eat 5/day

So that →

By 2016, 50% of Kane
adults have seen a
KCHD ad/message
about eating more
fruits & vegetables

So that →

- % of planned press releases out each month
- % of planned FB posts/how many actual
- % of trained staff in FB post each month
- % of identified staff trained in FB/ Twitter
- % of planned contests/incentives per month initiated
- % of planned respondents who respond

So that →

hits on webpage
articles in newspaper
Twitter followers
phone calls
FB fans/likes
Actual time/planned time
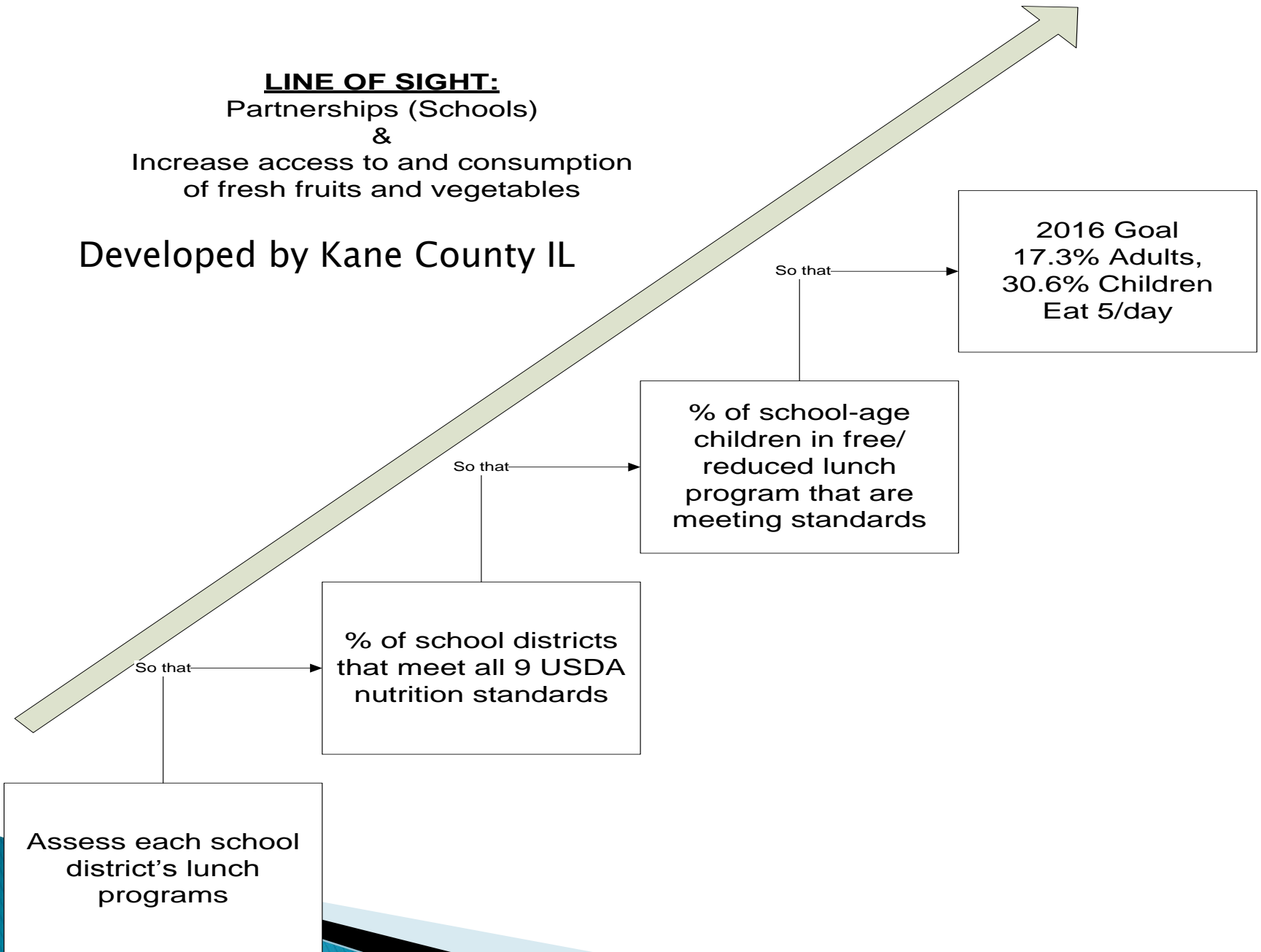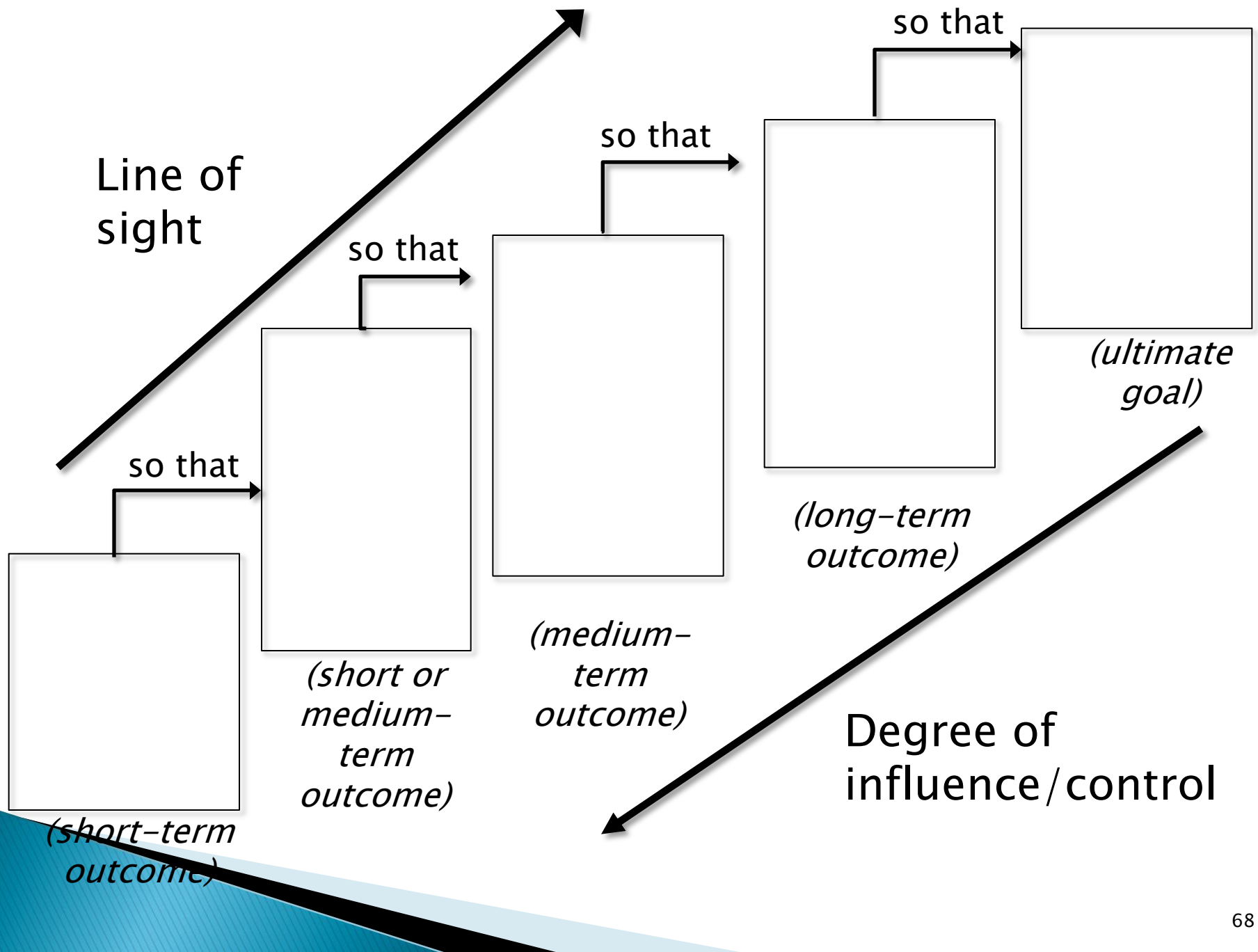
LINE OF SIGHT:
Partnerships (Schools)
&
Increase access to and consumption
of fresh fruits and vegetables

Developed by Kane County IL

So that → 2016 Goal
17.3% Adults,
30.6% Children
Eat 5/day

So that → % of school-age
children in free/
reduced lunch
program that are
meeting standards

So that → % of school districts
that meet all 9 USDA
nutrition standards

Assess each school
district's lunch
programs

Line of
sight

so that

so that

so that

so that

(ultimate
goal)

(long-term
outcome)

(medium-
term
outcome)

(short or
medium-
term
outcome)

(short-term
outcome)

Degree of
influence/control

68

Let's Work on Line of Sight

Work on Line-of-Sight graphs to identify quantifiable outcomes and/or important metrics are described for each level of the agency.

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Strategies are . . .

. . . Stated methods to achieve Goals and Objectives.

. . . Indicators of action, the "How to" achieve the goal or objective.

. . . Serve to guide budget activities used to achieve goals.

. . . Brings about a desired future, such as achievement of a goal.

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Strategy Examples

Example of a strategy

Regulate, educate, and provide technical assistance to users on the access of care.

Objective vs. Strategy: An example, compare the process of planning a vacation (where, when, duration, budget, who goes, how travel are all strategic objectives) with the final preparations (tasks, deadlines, funding, weather, packing, transport and so on are all strategies).

Are Our Strategies . . .

- Methods to achieve or Goals and Objectives?
- Indicators of action, the "How to" achieve the Goal or Objective?
- Serve to guide budget decisions?
- Brings about a desired future, such as achievement of a Goal?

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Short Break!
Be Back in 15 minutes, please!

STRATGIES FOR IMPLEMENTING THE STRATEGIC PLAN

Strategic Plan

EFFECTIVE   **EFFICIENT**   **ACCOUNTABLE**

WHAT
Leaders Leading the Way
Results and Data-Driven Operatior

HOW
Customer-Focused Service
Clear Accountability & Responsibility
Employee Engagement
Stakeholder Involvement

WHY
Improved Citizens Outcomes

CREATING AND ENDURING CULTURAL SHIFT

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Today: Leave With a Plan

1. Leading the Way
2. Focus on Alignment and Outcomes
3. Results and Data Driven Operations
4. Customer Focused Service
5. Clear Accountability
6. Employee Engagement
7. Stakeholder Involvement

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Leaders Make it Happen

- Strategic planning provides the priorities and direction for making decisions and allocating resources to pursue strategies
- The Agency's early success will be realized through engaged employees and stakeholders using an empowered approach for their involvement
- Leaders "Make-It-Happen"

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The Playbook

Leading the Way

- Lead the learning
- Deadly sins of management
- Prepare the culture

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Remove Deadly Sins

Seven deadly sins of management

1. Unclear direction
2. No line-of-sight
3. Unclear accountability
4. Inconsistent language
5. Poor issue transparency
6. Inappropriate resources
7. Inadequate tools/skills

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The Playbook

Focus on Alignment and Outcomes

- Review and update CHA data when appropriate
- Align you CHIP priorities
- Align your Office/Division/Program's outcomes
- Translate goals to outcome measures
- Establish scorecards for each measure

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Align Your Agency Outcomes

- Understand the Director's priorities
- Define Agency core-mission measures
- Define Office, Division and Program core-mission measures
- This is the foundation of ownership
- Clarity will continue to emerge

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The Playbook

Results and Data-Driven Operations

- Create clarity about how the Agency, Offices, Divisions and Programs work
- Understand the core work you must be good at in order to achieve your outcomes
- Map your fundamentals
- Understand your core processes
- Establish measures to gauge effectiveness

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Example – Fundamentals Map
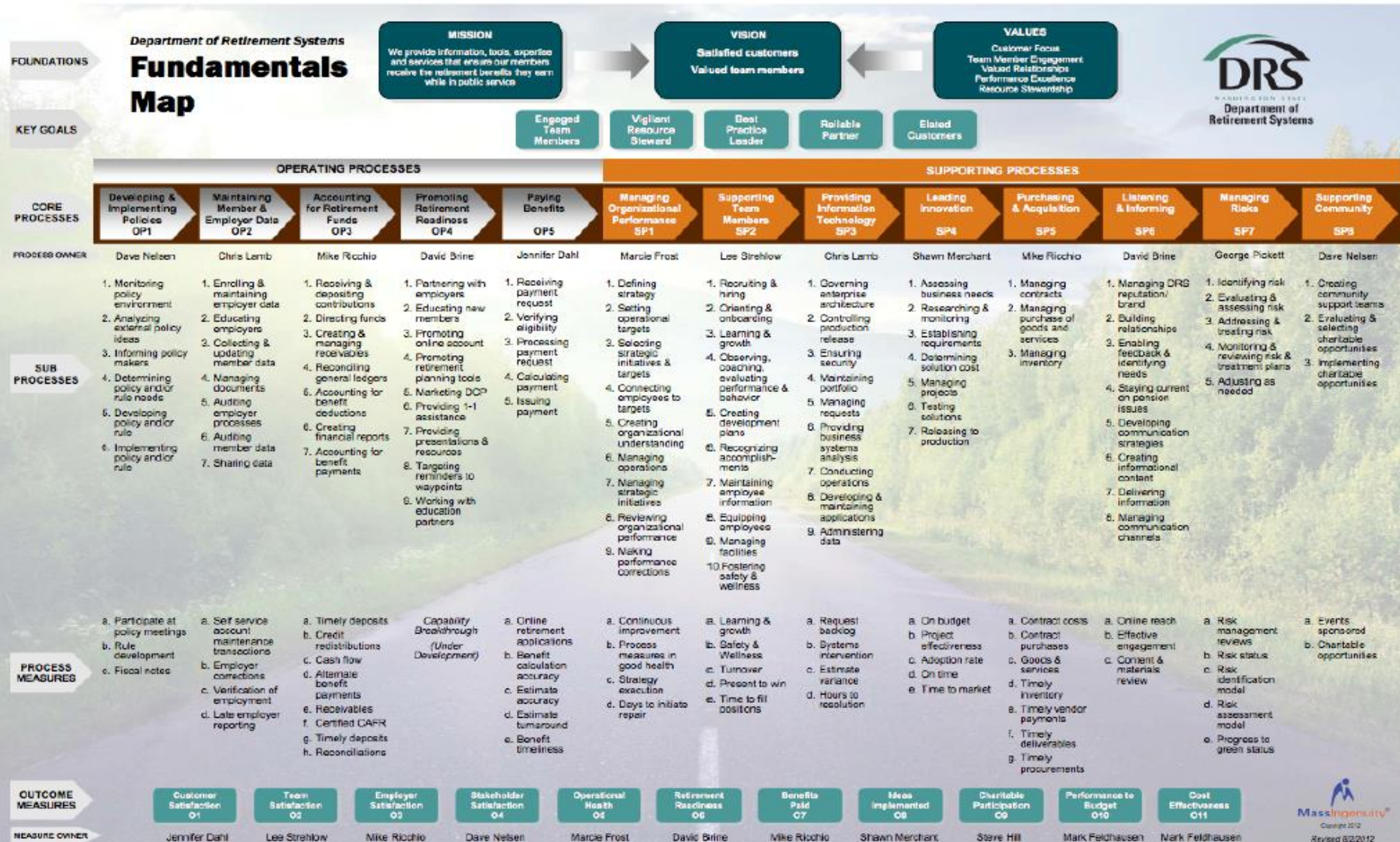
Benefits of Fundamental Maps

▸ Shared understanding of how the Agency, Offices, Divisions and Programs create value (a common language)

▸ Clear ownership for results

▸ Visibility as to what is working and what is not

▸ Foundation for connecting every employee to the part they play

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The Playbook

Customer Focused-Service

- For each strategy, identify your primary customers
- Ask them what they need from you
- Establish measures that indicate success in meeting their needs
- Work to continuously improve results

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Customer Driven End State

We understand who our customers are

We know every strategy has a customer

We know what our customers value

We measure effectiveness in meeting customer needs

Customer feedback drives our strategy focus

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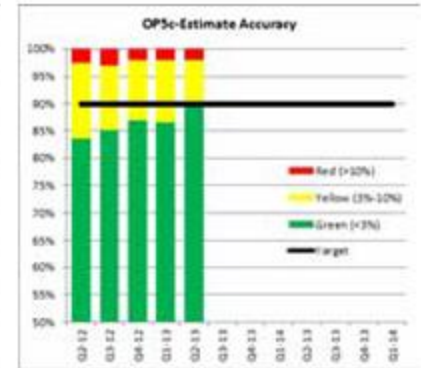Pearls of Wisdom Consulting, LLC

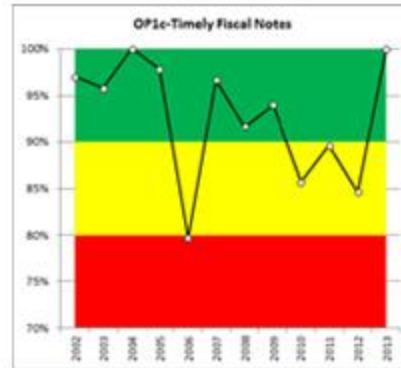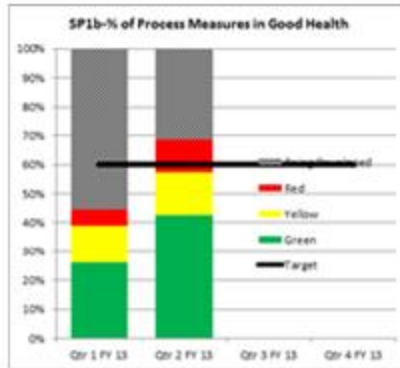# The Playbook

Clear Accountability and Responsibility

1. Assign ownership
   ◦ For outcome measures
   ◦ For process measures

2. Establish Quarterly Target Reviews
   ◦ Accountability for improvement
   ◦ Triggers for action (red/yellow/green)
   ◦ Safety = True Transparency

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Quarterly Target Reviews

SAFE = TRANSPARENT

The Playbook

Employee Engagement

- Understand the impact on results of engagement
- Assess where we are today with the engagement
- Determine what is required by leadership to move to the ideal state

To Successfully Deploy Strategic Planning

Involve Everyone:

- Leadership
- Champion
- Customers
- Empowered Employees
- Involved Stakeholders

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Engagement End State

I understand where my organization is going

I see how my work fits into our goals

I understand what processes I am accountable for

I have the skills/resources to do my work effectively

I always know how well my processes are working

The Playbook

Identify Stakeholders and Their Involvement

- Understand who your stakeholders are
- Assess where we are today with their involvement
- Determine level of engagement

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The 10 Factors That Transmit and Embed Culture

Creating an Enduring Culture Shift

1. Formal statements of the organizational philosophy
2. Design for physical spaces
3. Deliberate role modeling, teaching, and coaching by leaders
4. Explicit reward and status system, and promotion criteria
5. Stories, legends, myths and parables about key people and events
6. What leaders pay attention to, measure, and control
7. Leader reactions to critical incidents or organizational crisis
8. Organization design and structure
9. Organizational systems and procedures
10. Criteria used for recruitment, selection, and promotion

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Dr. Edgar Schein, MIT

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Next Steps
10 Stations on the Journey

Station   1: Conduct an Environmental Scan

Station   2: Set/Review Organizational Direction

Station   3: Develop/Revise Strategic Goals, Objectives, and Strategies

Station   4: Develop/Revise Performance Measures

Station   5: Develop/Revise Action Plans

Station   6: Allocate Resources

Station   7: Implement Action Plans

Station   8: Track Progress on Actions

Station   9: Modify Action Plan based on data

Station 10: Evaluate Strategic Planning Process

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Next Steps – Leadership Role

- Able to articulate the strategic planning process to internal and external stakeholders.
- Each program should know how they roll up (i.e. where they fit in to the agency big picture).
- The strategic planning process should be meaningful to Front Line staff; they need a connection.
- Strategic planning provides clarity for changes and/or new direction.
- Shows us what/why/how we're doing as an agency.
- Defines where we are, where we want to be and includes "SMART" objectives.
- Tactical . . . How does it feed the strategic planning process?
- More inclusivity should enhance the strategic planning process.

We are really planning strategically for our agency! Let's do it well!!

Thank You – Questions?

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