



Strategic Planning for Local Health Departments

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Review from September Sessions

- Purpose of strategic plans
 - Setting organizational direction
 - Satisfying requirements for accreditation
- Elements of strategic plans
 - Mission, Vision, Values of organization
 - Data
 - Strategic Priorities
 - Measurable Objectives
 - Action Plan

Strategic Planning Process

- Assess readiness/Leadership on board
- Identify who to involve/roles in planning
 - Internal staff
 - Governing board and advisory board members
 - External stakeholders
- Review and update mission, vision & values

Strategic Planning Process

- Plan and collect data
 - External trends
 - Health and demographic information
 - SWOT
- Identify themes suggested by data
- Develop strategic directions (3-5)
- Develop measurable objectives for each strategic direction
- Include consideration of CHIP
- Develop an action plan with timelines and responsibilities clearly defined

Strategic Planning Process

- Link strategic plan/action plan with internal QI plan
- Implement the strategic plan
- Monitor progress
- Evaluate and update

Using Data to Drive Strategies

- Data types to consider
 - External Factors (Required by PHAB)
 - Community data (county or municipal)
 - Be sure to consider data used with CHIP
 - Include both objective and subjective data
 - Health department data
 - SWOT (required by PHAB)
 - Reports, financial information, client satisfaction, Board priorities
 - State data
 - Federal data

Using Data to Drive Strategies

- Do's and Don'ts
 - Don't get buried in data
 - Don't spend time with data that is irrelevant
 - Do involve an internal team
 - Do seek the participation of the county epidemiologist
 - Do look for themes and interrelationships
 - Do consider data reflecting population health issues
 - Do consider your mission and vision as of core importance in defining strategies

Nomenclature Review

Theme: A general perspective about a topic that emerges from data review

Strategic Direction: A summarization of one or more themes that helps define direction for the health department

Goal: A broad statement of direction towards which the health department will apply resources and effort

Objective: A specific, measurable target, the achievement of which will help fulfill a goal.

Developing Strategic Directions

- Identify important themes that emerge from the data (8 – 15)
- Look for linkages among the themes; combine where possible
- Eliminate the lowest priority themes
- Restate the remaining 3-5 themes as strategic directions

NOTE: Strategic Directions serve as the basis for defining measurable objectives

Developing Strategic Directions

Example: Combining themes to form SDs

Themes:

- Increasing rates of asthma among children
- Increasing rates of lung cancer, especially among women
- Increasing rates of tobacco use by youth
- Increasing number of Risk Level 4 days of air quality in the region

Developing Strategic Directions

Example: Combining themes to form SDs

Themes:

- Increasing rates of asthma among children
- Increasing rates of lung cancer, especially among women
- Increasing rates of tobacco use by youth
- Increasing number of Risk Level 4 days of air quality in the region

Strategic Direction through Combining:

Reduce the level of population exposure to tobacco smoke and other airborne pollutants

Setting Goals from Strategic Directions

Note: This step is optional, but may help in defining measurable objectives

Consider defining one or two goals that encompass each strategic direction.

Example:

SD: Strengthen internal capacity of the organization to improve effectiveness of its programs

Goal: Evaluate and continuously improve the organization's processes, programs and interventions in order to protect and promote health among residents of the jurisdiction.

Measurable Objectives

Template #1:

- Measure of the change desired
- Of what
- By whom
- By When

Example:

Reduce by 25% the percentage of adolescents using tobacco products by December 31, 2015

Measurable Objectives

Template #2:

- The degree of change
- The type of change
- The area of change
- The target population
- The timeframe

Example:

Increase by 15% the number of servings of fruits and vegetables consumed daily by children and adolescents aged 6 to 19 years in Morris County by December 31, 2016

Measurable Objectives

Generally, create 2 to 6 objectives for each Strategic Direction/Goal

Using **SMART** objectives¹

Specific
Measurable
Achievable
Relevant
Time oriented

¹Required by Public Health Accreditation Board

Measurable Objectives

Recommended content:

OUTCOMES relating to

- Population health status (e.g. YPLL)
- Surrogate measures of population health (e.g. smoking rates, income, education, IMZ rates)
- Community infrastructure (e.g. access to care, interagency linkages, progress with CHIP)
- Strengthened internal capacity and/or effectiveness

Measurable Objectives

Less effective content:

Objectives describing PROCESS as opposed to outcomes. Examples:

- Convening work groups
- Defining community priorities
- Addressing priorities through action
- Improving effectiveness

NOTE: Some of these may be useful as action steps in the strategic plan

Measurable Objectives – Additional Thoughts

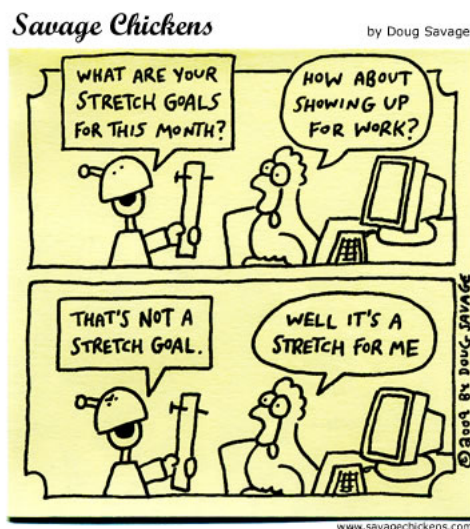
- Make sure they are compatible with your organization's mission and vision
- Involving staff in setting them helps create buy-in
- Be clear on what information will need to be collected to evaluate progress
- Align your objectives with those of the Community Health Improvement Plan

Measurable Objectives – Additional Thoughts

Remember: This is your STRATEGIC plan, not a tactical or program plan. Therefore,

- Thinks strategically
- Think out of the box
- Think big
- Develop **STRETCH** goals and objectives
- Create an internal environment that supports and rewards innovation and creativity, and views mistakes or setbacks as learning experiences

Stretch Goals and Objectives



Developing an Action Plan

For a three-year strategic plan:

- YEAR ONE: Identify a comprehensive set of specific actions, responsibilities and timelines for each of the objectives which will be addressed during the year
- YEAR TWO: Sketch a set of specific actions for each of the objectives to be addressed during the year, with examples of responsibilities and timelines where possible
- YEAR THREE: Can be even less specific and more vague.

Year One Action Plan

Goal: Reduce tobacco use among teens

Objective: Reduce availability of tobacco to teens through enforcement of current laws

Action Plan:

Action	Lead	Begin	Complete
Clear plan with Board	Director	5/1/13	5/30/13
Meet with police dept.; secure their involvement in local tobacco stings	Director, Project lead	6/15/13	7/31/13
Recruit Teens for project	Project lead	9/1/13	10/1/13
Train Teens to participate in sting activities	Project Lead	10/15/13	11/30/13

Year Two Action Plan

Goal: Reduce tobacco use among teens

Objective: Reduce availability of tobacco to teens through enforcement of current laws

Action Plan:

Action	Lead	Begin	Complete
Identify stores that are primary targets	Project Lead	January?	
Practice session with teens	Project Lead		
Begin Stings at targets; coordinate with Police, Debrief teens	???		
Send follow-up action notices to stores			
Share Results with Board			

Year Three Action Plan

Goal: Reduce tobacco use among teens

Objective: Reduce availability of tobacco to teens through enforcement of current laws

Action Plan:

Action	Lead	Begin	Complete
Evaluate Year 1 & 2			
Consider repeating			
Talk with police – their impressions?			
Should we be sharing info with press?			

Developing an Action Plan

Important Elements:

- Involve the staff who will be responsible for the work
- Be realistic in setting timelines
- Identify staff tasks that can be given lower priority to assure SP work gets done
- Be sure to include the work elements related to CHIP and to the internal QI plan (PHAB requires)

Steps Prior to Implementation

- Integrate all of the SP components into a single document
- Present a summary of the SP to your Board(s); seek approval if required
- Define a strategic staffing plan to assure the action plan can be met
- Present a summary of the approved SP to your staff
- If going for Accreditation, submit the plan to PHAB (see last slide)

Implementing the Plan

1. Meet with your management team to plan implementation, calendar key deliverables in the action plan
2. Identify resources needed and their source
3. Consider kicking off implementation with an all staff meeting including your board chair/representative
4. Include time on management team meetings monthly to review progress

Implementing the Plan

5. Plan quarterly reviews of progress, issues, challenges
6. Share progress at key points with staff and with your Board(s)
7. Allow for flexibility; if something isn't working or isn't feasible, make changes during the year.
8. Consider recognitions and celebrations for successes throughout the year

Ending Year One

- Conduct a 4th Quarter review in early December
- Celebrate the successes with your staff
- Identify action steps not completed and roll into the Year Two action plan
- Deepen the specificity and completeness of the Year Two action plan
- Add more specificity and clarity to the Year Three plan

Ending Year One

- Create a rough draft Year Four plan
- Share results with staff and Board(s)
- To meet PHAB requirements, create a report that shows:
 - Progress in meeting goals and objectives
 - Explanation of how targets are monitored (i.e. measures and methods)
 - Significant revisions to the plan, if any

PHAB Requirements

Strategic Plan submissions must include:

1. Membership of the planning group
2. The SP process steps taken
3. The completed strategic plan, including
 - Mission, vision, values
 - Strategic priorities
 - Goals & time-framed measurable objectives
 - External trends and SWOT
 - Linkages with the CHIP and intern QI Plan

PHAB Requirements (cont.)

4. Annual reports, if the SP is submitted to PHAB after the end of first year of implementation. Reports must summarize progress made and show how targets are monitored

Closure

- Evaluation
 - What worked?
 - What didn't work?
 - Comments?
- Next Steps?

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