Introduction

Definitions
    Establishing common language
What is Strategic Planning?

Strategic planning is a process for defining and determining an organization’s roles, priorities, and direction over three to five years.

What is a Strategic Plan?

- A strategic plan is an organizational road map for the future
  - Creates communication opportunities
  - Guides decision-making (direction)
  - Establishes priorities (places you must see)
  - Establishes some parameters (route)
  - Allows for options if needed (detour)

What makes a plan “strategic”

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

- The attainment of the highest possible level of health for all people. It means achieving the environmental, social, economic and other conditions in which all people have the opportunity to attain their highest possible level of health.

Why use a Health Equity Lens?

- Structural inequities are often produced inadvertently
- These internal structures, policies, processes, etc. are so embedded into the organization that it may be difficult to "see" the inequities
- Every decision an organization makes has an impact on people – both inside the organization and externally
- Good ideas can play out in ways that inadvertently disadvantage or harm certain groups.
- Provides an objective means of ensuring that health equity is considered

Why does Strategic Planning Matter?

- Sets forth what an organization plans to achieve, how it will achieve it, and how will it know if it has achieved it.
- Addresses your county's public health needs while allowing you to adapt to a changing environment.
- Fundamental tool for effective management
- Plan provides criteria for monitoring progress and outcome of the plan to justify the use of local and state resources.
Strategic Planning Process

1. Strategic planning focuses on the entire agency
2. Timeframe
3. Participants for your process
4. There are many ways to do strategic planning: regardless of the process, there are five main elements.
   1. Develop a shared understanding of why an organization exists and its aspirations for the future.
   2. Information needs to be gathered and reviewed.
   3. Strategic priorities.
   4. Implementation of work plans.
   5. Evaluation and monitoring progress.

Develop a shared understanding of why an organization exists and its aspirations for the future

- Why you exist, what you want to achieve, what defines you
  - Why you exist - why you exist, what you do, and who you serve
    - Example: Protecting and improving the health of Iowans.
  - What you want to achieve - what does success in what you do look like?
    - Example: Healthy Iowans in healthy communities.
  - What defines you - what do you care about, what sets you apart from other public service providers.
    - Example:
      - Accountability
      - Collaboration/teamwork
      - Communication
      - Health Equity
      - Quality
      - Results-Oriented
      - Workforce Development
Information needs to be gathered & reviewed

- Gather Data
  - Data can include:
    - CHNA HIP report
    - County demographics
    - Department financial analysis
    - Workforce assessments
    - Policy and legislative scans
    - Department program evaluations and quality improvement results
    - Customer satisfaction feedback
    - Results of SWOT and SOAR

SWOT

Strengths
Positive tangible and intangible attributes, internal to the department, which are within the department’s control. Need to be maintained, built upon or leveraged.
- What advantages does your council have?
- What do you do better than anyone else?
- What unique or lowest cost resources can you draw upon that others can’t?
- What do people in the food system field see as your strengths?

Weaknesses
Factors within the department’s control that detract from its ability to attain desired goals. Need to be remedied, changed, or stopped.
- What could you improve?
- What should you avoid?
- What do others see as your weaknesses?

Opportunities
External attractive factors that represent the reason for the department to exist. Which opportunities exist in the environment, which will propel the council? Need to be prioritized, captured, built upon and optimized.
- What good opportunities can you spot?
- What interesting trends are you aware of?

Threats
External factors beyond the department’s control which could place department’s mission or operation at risk. Need to be countered or minimized and managed.
- What obstacles do you face?
- What are other PH agencies doing?
- Are quality standards for public health changing?

SOAR

Strengths
What are your greatest strengths? What is working really well? What do you value most in the organization? What are you most proud of?

Opportunities
What are the best opportunities for your organization? How can you meet the needs of the stakeholders? Where can you add value and benefit to others?

Aspirations
What are your hopes for the organization? What would you like the future to look like? What are you deeply passionate about? What projects, programs and services would support these dreams?

Results
How do you know you are reaching your goals for the organization? What are 3-5 indicators or measures that will let you know you are achieving the preferred future? What will be different for the stakeholders? Who is going to be responsible for making things happen?
BOH members want to do good for the public.
Focused on right now, “flavor of the month.”
Strong relationships within the community and region.
Public Health within the County vs. subcontract with another entity.
Having our own personnel, improved our awareness in the community.
BOH has staff working in the county promoting our county. (strength)
Aligning what PH is doing with state and national goals.
Relationship with BOS stronger than in past years.
BOS advocate for BOH.
New vaccination plan submitted yesterday.
Driven by experienced BOH personnel.
Open atmosphere for crafting new ideas.
Support by BOH.
Personnel with education and experience.
Interns.
Supervisors knowing their County needs.

Strain on Mental Health—public health may have a role with this issue due to being a small community.
Community is as strong in mental health as in the past.
Here & Now—Having the BOH/Public Health/Environmental Health on the same track which will create a stronger presence in the community.
Community as a whole has mental health on the radar.
EH/PH—more people moving to county away from cities, may have to grow to provide services.
Advocate for PH funding.
Turned in POD plan workbook, lots of strategic planning to work on this because of work being done for COVID.
One effort for initiatives (such as radon) vs. two separate efforts.
More cohesive department.
Reviewing Foundational Capabilities—personnel/workforce development—skills, training, etc.
Vaccinations support and management of vaccine distribution.

To provide our county with good access to essential Health and Environmental services that improve the lives of all families in the county.
Improve access to mental health and family function. (With guidance we can all contribute to this goal through advocacy, grants, working with local private and public partners—this may be a “how”)
To provide the community in a health crisis through sound needs assessment and action. (One area will soon be vaccinations support and management of vaccine distribution. But long-term we will best serve through changing structure and access for good Mental Health support—may be specific activities.)
The future of this organization will play a greater role developing regional health care systems.
Educating the government (population) about our role and needs for financial support.
Meeting the health and safety needs of the residents and businesses.
Access to care or services in the most timely manner.
Increase the number of providers and specialists available to serve the community, Marriage and family providers, medical providers, addictions, education, etc.
Internal capacity-building and education of health department staff.
Community capacity-building by engaging school, churches, hospital, local businesses through the benefits of healthy living, understanding the county needs. Public Health corps.
Increased staff availability to discern needs, building new and strengthening existing primary care facilities. Other health care community. Bonding funding strategies to meet departmental goals. Funding sustainability is important.

Strategic Priorities
Consider establishing three or four priorities and determining how you will meet those priorities in the context of the rest of your work.
Analyze the data—identify cross-cutting themes, emerging issues and key strategic issues.
Use a SWOT and SOAR to visualize themes.
Questions to consider:
Which issues are strategic?
Which issues are in the community health plan that the health department will address?
What does the HD need to do to prepare for threats and challenges?
What does the HD need to do to improve weaknesses?
What does the HD need to do to achieve its aspirations?

Information needs to be gathered and reviewed
Gather data (cont.)
Perspectives to include:
Community
Financial
Local Health Department
State and National
Learning and Growth
Organize the data
By the four perspectives or some variation of perspectives.
By stakeholder input

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Strategic Priorities

- Prioritization of themes
  - Identify the categories
    - Examples:
      - Systems Development
      - Education
      - Health Equity
      - Workforce Development
  - Select priority areas
  - Flush out the details for each selected priority in your implementation work plan
    - May include partnerships, communication, policies, etc. that fall under one or more of the priority areas.

Implementation of work plans

- Strategic issues can be sorted in three categories.
  1. Those for which no action is required at present, but which must be monitored
  2. Those that are coming up on the horizon and are likely to require some action in the future and perhaps some action now
  3. Those that require an immediate response.

Implementation plans include the following:

- Specific programs, activities and interventions that will be implemented to address each objective.
- Who is responsible or accountable for each activity (i.e. staff member, team or department).
- Timeline for completion.
- Measurement plan showing when and how goals and objectives will be measured.
Evaluation and monitoring progress

- Strategic plans should be reviewed and revised regularly
  - Establish a process for monitoring implementation and evaluation of the plan
  - Use OI to improve processes and outcomes
  - Maintain flexibility with the plan as the environment changes
  - Update the plan as needed
  - Communicate successes and results through annual reports and other sharing methods.

Who

Who should be involved

- County-based
  - BOH members - actively involved in the process
  - All department/agency staff (not just management staff) - actively involved in the process
  - BOS members - findings are shared with BOS members

- Health system-based or other
  - Governing entity/administration - actively involved in the process
  - All department/agency staff (not just management staff) - actively involved in the process
  - BOH members - input may be requested by members; findings are shared with BOS members
  - BOS members - findings are shared with BOS members
Sharing with funders and decision makers

- Your CHNA & HIP and your strategic plan makes the business case for an investment in public health.

Resources

- NACCHO Strategic Planning Guide
- Strategic Planning Guide - Guidance and Resources to Assist State and Territorial Health Agencies in Developing a Strategic Plan. ASTHO