

Agency Logo

ORGANIZATION ABC

2011-2014

STRATEGIC PLAN

January 2011

~ Note: The following is a sample outline with sections that appear in a typical Strategic Plan ~

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“Strategic Planning: Getting to the Heart of the Matter”

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INTRODUCTORY SUMMARY

<<Introductory details such as the strategic plan's duration and strategic priority categories that were focused on during the strategic planning session>>

ORGANIZATION DESCRIPTION

OVERVIEW/HISTORY

<<A brief agency overview and/or history>>

SERVICES

<<A narrative or list of the agency's services>>

STATE OF THE AGENCY

<<A narrative of highlights from the State of the Agency

To Note: The State of the Agency is presented by the Executive Director/CEO. The presentation draws upon a pre-session reading packet that the agency compiles and distributes to participants prior to the strategic planning session. The reading packet provides a thorough look at the agency's internal and external influential factors>>

STRATEGIC PLAN SESSION OVERVIEW & DEVELOPMENT PROCESS

<<A narrative of the strategic planning process developed for the agency and its specific needs. This section includes working agreements, a summary of meeting participants, and specific practices or methods used at the strategic planning session>>

MISSION, VISION & VALUES

MISSION

<<The agency's Mission>>

VISION

<<The agency's Vision>>

VALUES

<<The agency's Values>>

GOALS & STRATEGIES

<<An introduction to set the context of the agency's goals and strategies. A strategic plan will have goals under 4-5 strategic priority categories such as:

- Sustainability
- Organizational Culture
- Infrastructure
- Etc.

Strategic planning participants develop between 3-5 goals per strategic priority category. Each goal will generally consist of 2-6 strategies along with measurable outcomes per goal and per strategy.¹

Following are 3 sample goals under 3 different strategic priority categories with accompanying strategies and measures. These examples demonstrate how the ideas developed during the strategic planning session can be organized. For more examples or information about strategic planning, please contact Sharon N. Black Consultants, LLC >>

SUSTAINABILITY (SAMPLE)

Goal: A \$300,000 reserve within 2 years.

Measured by:

- Revenues and expenditures aligning with the Board approved budget reviewed

¹ Refer to the Useful Definitions for Strategic Planning on our website at snbconsultants.com for definitions of strategic priority categories, goals, strategies, and measures.

monthly.

Strategies

- Increase Medicare visits
 - ✓ Medicare visits increase 5% by 12/31/2011 and 10% by 12/31/2012
- Obtain new funding
 - ✓ 2 new foundations provide funding within the immediate fiscal year
- Participate in a CCO
 - ✓ Participation in 1 Coordinated Care Organization by 6/30/2012

ORGANIZATIONAL CULTURE (SAMPLE)

Goal: An inclusive and productive work culture.

Measured by:

- An increase in positive results of an annual staff satisfaction survey regarding organizational culture.
- Stable or decreased staff turn-over per an annual review of staff retention rates.

Strategies

- Enable open and honest communications
 - ✓ 2 staff communications trainings scheduled semi-annually
- Establish and support the process to select and hire individuals who will contribute positively to the desired work culture and performance requirements
 - ✓ Review and revision of hiring policies and procedures annually
- Screen applicants for an interest in living in a rural community
 - ✓ Screening questions developed and incorporated into the HR process and reviewed annually

INFRASTRUCTURE (SAMPLE)

Goal: A fully implemented 2-year marketing & outreach plan.

Measured by:

- ☑ A completed marketing plan presented to the Board by 3/31/2011
- ☑ Benchmarks appearing in the marketing plan reviewed semi-annually thereafter

Strategies

- Create a Marketing & Outreach Advisory Committee
 - ✓ Marketing & Outreach Advisory Committee to convene by 4/30/2011
- Assure allocation of resources to enable staff to focus on completing a marketing plan
 - ✓ Review allocation of resources semi-annually

IMPLEMENTATION & TIMELINE

<<Implementation and timeline details specific to the agency, including:

- *Steps taken upon approval of the Strategic Plan*
- *The frequency of Strategic Plan document reviews*
- *Etc.>>*

EXECUTIVE DIRECTOR & BOARD APPROVAL PAGE

<<Signature designates approval of the strategic direction and goals described in the strategic plan>>

Executive Director Signature: _____

Printed Name: _____ Date Signed: _____

Board Member Signature: _____

Printed Name: _____ Date Signed: _____

Board Member Signature: _____

Printed Name: _____ Date Signed: _____

Board Member Signature: _____

Printed Name: _____ Date Signed: _____

Board Member Signature: _____

Printed Name: _____ Date Signed: _____

Board Member Signature: _____

Printed Name: _____ Date Signed: _____

Board Member Signature: _____

Printed Name: _____ Date Signed: _____

Board Member Signature: _____

Printed Name: _____ Date Signed: _____

APPENDIX A: SWOT ANALYSIS

<<The agency's SWOT analysis developed at the strategic planning session>>

APPENDIX B: STATE OF THE AGENCY

<<The State of the Agency presentation supporting information>>

APPENDIX C: MEASURES CALENDAR

<<A quick-glance chart outlining goal/strategy measure due dates>>

APPENDIX D: OTHER SUPPORTING DOCUMENTATION

<<Other strategic planning supporting documentation>>