

# Strategic Planning FAQ

## **BIG PICTURE**

### **What is strategic planning?**

It's a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization does and why it does it.

### **Why are we doing this?**

The aim is to provide structure and alignment to our efforts, based on evidence and best practice, in order to realize our Mission and Vision. At the end of this process, we should have a plan for our organization's work that clearly shows our priorities for the next 5 years and provides a road map for how we will get from where we are to where we want to be. We can then use this road map internally and with partners to align our efforts.

### **Where did this whole idea come from? Have other organizations done this before?**

Many organizations have undergone strategic planning – not-profit, government and for-profit alike. Our process/terms/etc have been adapted from similar ones used by other local health departments and government organizations.

### **What's the basic process for this?**

X-Team developed five departmental Goals (see section below). Each Goal has a Workgroup made up of 5-6 staff from across all of the divisions. Over the course of the summer, each workgroup will develop strategies and objectives based upon their Goal. Once these are approved by the X Team, specific tactics will be developed in September to achieve the chosen strategies and objectives.

### **When will this all be implemented?**

Over the course of the next five years. The exact implementation will depend upon the strategies, objectives and tactics chosen. The plan will be revisited periodically to assess progress and adjust as needed in response a changing environment.

### **Is this for accreditation?**

While having a strategic plan is a requirement for accreditation, this is something we would and should be doing regardless.

### **What is the relationship between the 7 priorities and 5 goals?**

The 5 goals categorize the long-term results that PHMDC is working towards in the community and internally, and they cover all the work that PHMDC does. When planning for each goal, the seven priorities are what we want to see guiding the strategies, objectives and tactics chosen, so that through the strategic plan, the priorities are improved in our work and organization.

### **How do these differ from our mission, vision, and values?**

The point of strategic planning is to help us achieve our mission and vision. Our vision is the concise description of what Dane County will look like when we've achieved our mission, which is our brief description of our purpose or why we exist. Our values are the ideals we want to embody as individuals and an organization in our work every day.

## **STRATEGIC PLAN**

### **What is a strategic plan?**

A strategic plan is the document that results from the strategic planning process. It outlines the strategies, objectives and tactics we will take to achieve our five goals, provides guidance for how we will carry out our mission and vision, and ensures that all of us are working toward the same goals.

### **Is it going to cover all of the work we do at PHMDC?**

No. The plan reflects areas to be strengthened over the next 5 years to achieve our goals. But just because a certain program or service might not be mentioned in the strategic plan doesn't mean we do not do it.

### **What about the current programs and program objectives? How do they connect to the strategic plan?**

The idea behind the strategic plan is to provide an alignment of the entire organization's efforts to high level goals. That is different than "operational" goals and objectives for programs.

### **How will this affect my work?**

The plan does not necessarily reflect the everyday activities of the health department. It shows our intended direction and priorities over the next 5 years and aligns department staff, services and programs to make sure we are all working toward the same high level goals. This will help inform policy, operational and budget decisions and provide a structure to show progress,

### **How will the Population Health Profiles play into this?**

The data provided by the PHPs will be utilized in the information gathering steps of the process.

## **GOALS**

### **What are our Goals?**

We have four Community Impact Goals:

1. **Healthy beginnings**, so children born in our community get off to a good start.
2. **Healthy places to live, work, learn and play**, so the physical environments in our community are safe.

3. **Healthy eating and active living**, so the people of our community are more physically able to enjoy long, productive lives.
4. **Preventing injury, trauma and disease**, so unintentional injuries, violence-related behavior, emotional distress, and communicable diseases are minimized.

**In addition to one Internal Impact Goal: High Functioning Organization**, making our department run as efficiently and effectively as possible.

**How were the goals picked? Who picked them?**

The Goals were decided upon by the X Team, based on advice from our strategic communications consultant. The X Team aimed to pick 4 Community Impact Goals that were broad enough to include every PHMDC program, but also easy to understand and communicate. In addition, they chose the internal impact goal to improve organizational effectiveness.

**Are the goals from a national list?**

These goals were created by the X Team, but align with state and national agendas like Healthiest Wisconsin 2020 and the National Prevention Strategy.

**WORKGROUPS**

**How were the teams picked? Who picked them?**

The teams were created by the Strategic Planning Core Team, with X Team approval, and they include every manager/X Team member, as well as some staff from across all divisions. These staff members were chosen based on their workload distribution mix of expertise, skills, backgrounds, and perspectives, and desire for professional development opportunities.

**What are the expectations of the co-leads?**

Each Workgroup has two co-leads. The co-leads are there to help facilitate meetings, help with additional content expertise and research, and move the work forward.

**Are teams cross-divisional?**

Yes! Each workgroup has members from 2-3 divisions.

**What is the manager to staff ratio on the teams?**

It varies from group to group, but generally 1:1.

**What is the standard process for feedback across workgroups so that the strategies don't overlap?**

Lesly and Shawnee will be at each meeting to facilitate. Amy will keep notes, All will help maintain communication between groups, check for overlap, and work with the core team and co-leads to make any needed adjustments.

### **How are Workgroups going to 'boil' their Goals down to three strategies without leaving things out?**

They are going to leave things out, and that is okay. The aim isn't to cover all of the work that we do here, but provide a plan for focusing on areas to be strengthened to meet our goals, mission and vision. This process will happen every five years, and as such, if something isn't targeted now, it still can be in the future.

### **How will the Workgroups present the strategies and objectives?**

As strategies and objectives are developed, there will be an opportunity for other staff to provide input and feedback. Once the workgroup work is finalized, it will be reviewed and approved by the X Team. Once the tactics are developed, all will be combined into a single strategic plan document.

### **Do we have the resources to do everything that we want?**

The resources of PHMDC will have to be taken into consideration by the Workgroups and reviewed on an ongoing basis during the 5 year implementation of the plan. That might mean planning for what we currently have, or finding ways to get the resources needed.

### **Strategic Planning Workgroups** (Co-leads are underlined)

#### **Healthy Beginnings**

Stephanie Kroll

Jennifer Weitzel

Daniel Stattelmann-Scanlan

Janel Heinrich

Camila Martin

Sridevi Mohan

#### **Preventing Injury Trauma & Disease**

Karri Bartlett

Amanda Kita

Kate Louthier

Doug Voegeli

Jami Crespo

#### **Healthy Places**

Ryan Sheahan

Jeff Lafferty

John Hausbeck

Kirsti Sorsa

Brandon Macomber

Mary Michaud

Erin Polkinghorn

#### **High Functioning Department**

Shawnee Parens

Nick Heckman

Ryan Sheahan

Melanie Jicha

Cathie Swee

Kari Sievert

#### **Healthy Eating Active Living**

Justin Svingen

Jordan Bingham

Sue Marshall

Beth Cleary

Stefanie Moccero

## **Workgroup Roles:**

### **Janel:**

- Overall leadership & direction – play the role of connecting the dots & distilling for people
- Leadership of internal communication – keep her finger on the pulse of communication & keep in forefront.
- Help facilitate getting right people on teams
- Keeper of the big picture – beyond PHMDC
- Provide support, time, resources
- Ensure that strategic planning continues to be a priority
- Hold executive team accountable.

### **Executive Team:**

- provide resources to group
- help ensure alignment across groups
- keep focus on decision-making criteria/scoping criteria
- participate in workgroup
- demonstrate importance of the work
- remove barriers to moving forward
- Hold each other & managers accountable

### **Shawnee**

- Executive-level project management
- Ensure that communication with executive team occurs
- Facilitation
- Communication internally – maintain communication loops; write executive level
- Decision-making within the scope of process
- Direct work of Lesly & Amy with regard to strategic planning

### **Lesly**

- Convenes & facilitates all workgroup meetings
- keeps focus on process
- keeps groups on track
- Participates in project management & communication w/executive team

### **Amy:**

- Takes notes at each workgroup – both for workgroup use & to be able to summarize & communicate out to department.
- Captures points that everyone needs to know & communicates points within communication plan
- Observes & debriefs group dynamics with Lesly & workgroup leader
- Leads communication activities throughout process. (Should be a standing section in the e-update for strategic planning.)

- Participates in project management & communication w/executive team

**Sharon:**

- Strategic planning administrative support – scheduling meetings, defined admin tasks, etc.

**Managers:**

- Participate in a workgroup
- Provide staff time for workgroups
- Resource support
- Communication within department consistent with overall communication plan.
- Serve as champion for strategic planning process; show leadership

**Co-Leads:**

- Provides content & subject matter expertise; helps keep things on track from a content perspective
- Observes the group dynamics
- Participates in facilitation in tandem with Lesly
- Prioritizes strategic planning work to move planning forward according to timeline
- Provides credibility within & outside of department;
- Taps external resources to help guide the work.
- Researches emerging trends on the topic so that they come in with a mindset of gathering big-picture.
- Challenges the status quo to advance dialogue.
- Also accountable for all items in Workgroup members, below.

**Workgroup members:** 5-7 per workgroup; keep as small as possible while making sure that relevant perspectives are represented. Will include one X team member per workgroup.

- Mindset of growth & opportunity; desire to grow leadership
- Full participation & engagement in workgroup
- Bring critical perspective to the work
- Do research outside meetings to develop strategies & objectives
- Participate in communication within the department about the strategic plan & planning process

## **GLOSSARY**

**Goal:** Broad, primary outcomes that encompass all of the work we do. Our 5 goals are Health Beginnings; Health Places to work, live, eat and play; Health eating & active living; Preventing Injury, Disease and Trauma; and High Functioning Organization.

**Mission:** A brief description of our organization’s purpose, or why we exist. Our mission is “To work with the community to enhance, protect and promote the health of the environment and the well-being of all people.”

**Objective:** A measurable step taken to achieve a strategy

**Priority:** The ideals we want to embody as an organization. Our priorities are Equity, Culture, Communications, Infrastructure, Leadership, Effectiveness, and Sustainability.

**Strategy:** An approach you take to achieve a goal

**Strategic Planning** A disciplined effort to produce fundamental decisions and actions that shape and guide what an organization does and why it does it.

**Tactic:** A tool used to achieve an objective

**Values:** The ideals that we want to embody as individuals in our work every day. Our values are Collaboration, Public Accountability, Equity and Inclusion, Excellence, Integrity, Creativity and Innovation, and Bringing Our Best Selves to Work.

**Vision:** The ideal of what Dane County will look like we’ve succeeded in our mission. Our vision is “Healthy People. Healthy Places.”

