

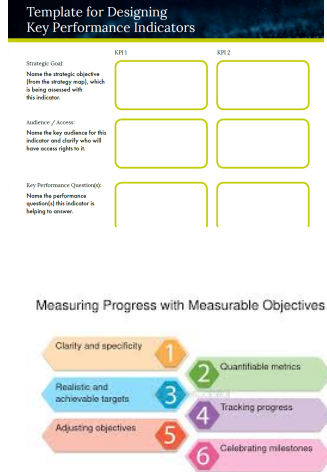
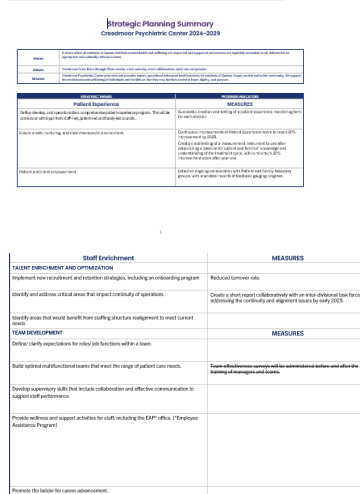


# Strategic Planning Roadmap for Mission-Driven Organizations



Define	Decisions	Sample Agenda (copy and enhance size)
<p><b>1. Initial meeting with CEO and Leadership Team</b></p> <p><b>2. First Meeting of the Planning Committee</b> Prewrite* to be determined by the planning team and LJLS.</p>	<ol style="list-style-type: none"> <li>Who should attend?</li> <li>Selection of the planning committee</li> <li>What background documents, surveys, and prior research are needed?</li> <li>Proposed format and timeline of the strategic planning process</li> <li>Milestones, meeting schedules, status reporting</li> <li>Communications plan</li> </ol>	
Describe	Tools	SWOT Analysis
<p><i>The purpose is to examine the current state and progress on previously set goals and metrics, if applicable, to inform future strategies.</i></p> <p><i>To identify recurring issues and devise solutions to challenges that may have hindered goal achievement.</i></p>	<ol style="list-style-type: none"> <li>It is most often handled in depth at the first phase of a planning retreat, and it involves uncovering opportunities and identifying risks to moving your organization to the next level.</li> <li>It can also be conducted as part of onboarding.</li> </ol> <p>The SWOT analysis is just <b>one</b> of several tools to be employed.</p>	

	Questions to answer	Example (copy and enhance size)			
<p><i>Uncover opportunities and identify risks to moving your organization to the next level.</i></p> <p><b>Data Analysis</b></p> <ol style="list-style-type: none"> <li>1. <i>SWOT Analysis</i></li> <li>2. <i>PWESTLE Analysis</i></li> <li>3. <i>Annual Report</i></li> </ol> <p><b>Vision, Mission, and Values</b></p>	<ol style="list-style-type: none"> <li>1. How will we make the world better in the future?</li> <li>2. What have been the organization's Strengths, Weaknesses, Opportunities, and Challenges/Threats?</li> <li>3. What skills, resources, personnel, systems, and processes must be improved upon, enhanced, redesigned, hired, etc., to prepare us for our envisioned future?</li> <li>4. What financial, environmental, demographic, and political realities will impact our mission?</li> <li>5. What are our immutable values?</li> <li>6. What leadership pipeline must be in place to equip a steady supply of high [potentials as individuals retire or move out of the organization?</li> </ol>	<p><b>PSYCHIATRIC CENTER</b></p> <p><b>Our Vision</b> A future where all residents of █████ feel their mental health and wellbeing are respected and supported and services are equitably accessible to all, delivered in an appropriate and culturally relevant manner.</p> <p><b>Our Mission</b> █████ connects and provides expert, specialized behavioral health services for residents of █████ on-site and to the community. We support the emotional-social well-being of individuals and families so that they may live lives rooted in hope, dignity, and purpose.</p> <p><b>Our Strategy</b> Advance the delivery of high-quality, equitable behavioral health care services through an unwavering commitment to compassion, collaboration, and innovation.</p> <p><b>Our Values</b></p> <p><b>"We Care More"</b></p> <p>Through:</p> <ul style="list-style-type: none"> <li>More candid – Say the "thing"</li> <li>More curiosity – Ask the question</li> <li>More collaboration – Offer and accept help</li> <li>More creativity – Try something new</li> <li>More compassion – Do it with your whole heart</li> </ul>			
<p><b>Decide</b></p>	<p>What overarching themes will guide the strategies to help us carry out our mission?</p>	<p><b>Example</b> (copy and enhance size) of thematic goals and Logic model</p>			
<p><i>Choose up to three thematic goals under which your strategies will lay.</i></p> <p><i>Decide on the S.M.A.R.T. goals.</i></p>	<p>Use a Logic Model to justify the choice of thematic goals and strategies.</p>	<p>For the next five years the XYZ strategy will be driven by a Patient-Centered focus informing care and treatment, strategically incorporating these three goals:</p> <table border="1"> <tr> <td>Patient Experience</td> <td>Treatment, Care, and Service</td> <td>Staff Enrichment</td> </tr> </table> <p><b>Basic Logic Model Template</b></p> <p>The model was developed by Center for Health Systems Research and Analysis, LLC. © 2016. All rights reserved. For more information, visit <a href="http://www.chsra.com">www.chsra.com</a>.</p>	Patient Experience	Treatment, Care, and Service	Staff Enrichment
Patient Experience	Treatment, Care, and Service	Staff Enrichment			

Determine	Measures/ metrics	Sample (copy and enhance size)
<p><i>Decide tactics (goals and objectives) to achieve the strategic goals successfully.</i></p> <p><i>Set a timeline for activities (Preferably from one to three years. Five-year plans are also acceptable. Do this for each department being planned for.</i></p>	<ul style="list-style-type: none"> <li>Select relevant metrics that include quantitative and qualitative data. Include financial, community impact, programmatic data, and outcome targets.</li> <li>Set Key Performance Indicators (KPIs) for each Key Results Area (KRA)</li> <li>Create a timeline with milestones, action plans, and individuals or groups responsible for each activity.</li> <li>Agree on and outline specific metrics for each activity or process to be measured. Select inputs essential for successful milestone achievement.</li> </ul>	 <p>The image shows a template for designing KPIs with three rows: Strategic Goal, Outcome / Access, and Key Performance Indicator. Each row has two columns for KR1 and KR2. Below is a 6-step flowchart for measuring progress: 1. Clarity and specificity, 2. Quantifiable metrics, 3. Realistic and achievable targets, 4. Tracking progress, 5. Adjusting objectives, 6. Celebrating milestones.</p>
Delivery	Format* typical	Optional Format Styles
	<p>Draft includes:</p> <ul style="list-style-type: none"> <li>Cover</li> <li>Preamble</li> <li>Executive Summary</li> <li>Vision, mission, and goals</li> <li>Company thematic goals</li> <li>Goals, Objectives, action steps, and timelines for each department involved.</li> <li>1-5-Year Operational/ or Implementation Plan</li> </ul> <p>Appendix - Strategy Execution Plan-meetings, measures, and formats for monitoring and communicating progress.</p>	 <p>The image shows a 'Strategic Planning Summary' document for Ochsner Psychiatric Center 2014-2019. It includes a table with 'Initiative' and 'Measures' columns. Initiatives listed include Patient Experience, Staff Enrollment and Optimization, and Team Development. Measures listed include Patient Satisfaction, Reduced turnover rates, and Team collaboration scores.</p>
Phase 5: Final Draft	Components	

*An editable document is print-ready, can be modified by the company as needed, and can be used as a template for future plans.*

The cover, executive summary, table of contents, and plan are professionally designed and bound with your company's logo and supporting documents.

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**Debrief**

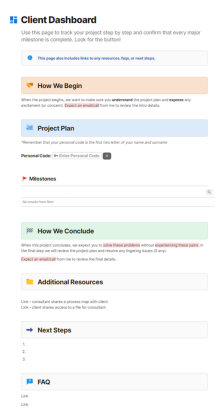
*Under the guidelines outlined in the contract, the implementation plan may be included or added separately. General Execution Guides are standard.*

*Project milestones and status reports will be available on a CODA client dashboard.*

**Resources**

<https://fastercapital.com/topics/setting-up-milestones-to-measure-progress-and-success.html>

**Monitoring tool**



# Format Options and Requirements

## Requirements and Prerequisites

*\*\*An executed contract and a deposit are required before each planning configuration. Rates are available upon request.*

Format	Requirements
One Day	The Company secures the site* unless otherwise specified. Payment is in advance. The company provides all refreshments or includes them in the contract if LJLS provides them. *Ideal sites provide a/v equipment, breakout spaces, and a food service area.
5-Day	The Company secures the site*, including A/V equipment.
6-month TBD - pending #days/hours	Days or hours per month and a meeting schedule to be agreed upon. An administrative or communications liaison must be designated.
Weekend Retreat TBD - pending # days	The planning contract includes travel, lodging, and other related costs.

The goal of this **checklist** is to:

- Clarify our methods and how we can partner
- Help you assess your company's capacity and preference for conducting the planning process and to plan your budget.
- Avoid misunderstandings and confusion.

