IHS 2017 Strategic Planning Framework

How IHS Will Develop The IHS Strategic Plan
Strategic Planning and Thinking

• Strategic Planning is:
  • “The process by which the leadership of an organization envisions the future and then identifies the necessary actions and assigns resources to implement the plan to improve economic performance” *

• Strategic Thinking is:
  • “A thinking process to consider alternatives and make choices to position the organization that involves the sharing and synthesis of pertinent information by the leadership of an organization that is needed to develop strategic objectives (ends)” *

• Goals, Objectives and Strategies:
  • “Statements of what needs to be achieved by an organization to move it toward its purpose...strategic in nature (long-term focused)”

* Quality as a Business Strategy, Ch. 8
Time Frame for Strategies and Objectives

- What are we trying to accomplish?!

- Mission  
  Endless

- Vision  
  5-20 years

- Goals, Objectives, and Strategies  
  2-5 years

- Charter  
  1 month – 2 years
Purpose of Planning

• Planning to **Operate** a present system
  • Maintaining current operations for the next 1-5 years
    • Can include adjustments for projected changes in volume, frequency, cost
    • Can include growth or replication of current services

• Planning to **Improve** a present system
  • Enhancing efficiency, effectiveness, timeliness, cost of present systems
  • Adding new systems to meet new demands or close gaps
Key Aspects of System Planning for Improvement

• Includes objectives to improve the organization from the external customer viewpoint (i.e. patients, tribal members)
• Balances short-term and long-term needs
• Identifies what part of the organizational system will be designed or redesigned
• Sufficient to guide development of new products and services
• Includes allocation of budget to improve the organization
System Planning for Idealized Design (continued)

• Describe the organization today
  • What is the current purpose?
  • What practical values (guiding principles, targeted behaviors, shared values) support the purpose?
  • What are the key processes, products and services?
  • What are the current roles and skills required by our people?
    • How well are people being managed and motivated?
  • What are the measures used to see how well the organization achieves its purpose?

Ref: Transforming Health Care Leadership, 2013. M. Maccoby, C. Norman, J. Norman, R. Margolies; Ch.11
System Planning for Idealized Design

• Describe the organization in the future
  • Purpose
    • What changes will be required in our purpose to describe our vision?
  • Practical Values (guiding principles, targeted behaviors, shared values)
    • What changes will be required in our practical values to achieve our vision?
  • Processes, Products and Services
    • What processes must be designed or redesigned to accomplish our vision and support the change?
    • What are the leverage processes (most important) to ensure our success in achieving the vision?
    • What products and services must be designed or redesigned to achieve our vision?
    • What processes are needed for collaboration and sharing?
    • What processes are needed for recognition?

Ref: Transforming Health Care Leadership, 2013. M. Maccoby, C. Norman, J. Norman, R. Margolies; Ch.11
System Planning for Idealized Design (continued)

• Describe the organization of the future (cont.)
  • People
    • What are the roles and responsibilities we need to fill and what kinds of people do we need to fill them?
    • What are the skills they need to have?
    • How should they interact? What are the important relationships?
    • What kinds of personality traits are we looking for?
    • What is meaningful work for them?
    • What kinds of relationships do we need to manage?
    • How will work be evaluated and rewarded?

Ref: Transforming Health Care Leadership, 2013. M. Maccoby, C. Norman, J. Norman, R. Margolies; Ch.11
Developing Strategies

• Collection
  • Research and Feedback Information

• Summarization
  • Analysis, Combination and Prioritization

• Grouping
  • Common Themes

• Abstraction
  • Key Issues

• Selecting an Approach
  • Strategies
Prioritizing Strategies

• Apply a weighting system

<table>
<thead>
<tr>
<th>Weight</th>
<th>Operational Definition of Weight</th>
</tr>
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<tbody>
<tr>
<td>5</td>
<td>Focus on this process/product will have immediate impact</td>
</tr>
<tr>
<td>3</td>
<td>Focusing on this process/product will have a longer term impact</td>
</tr>
<tr>
<td>1</td>
<td>IHS already has activities addressing this area</td>
</tr>
<tr>
<td>0</td>
<td>No impact on the objective expected from focusing on this process/product because beyond scope</td>
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Putting it Together

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Strategic Weight</th>
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</thead>
<tbody>
<tr>
<td>A</td>
<td>3</td>
</tr>
<tr>
<td>B</td>
<td>5</td>
</tr>
<tr>
<td>C</td>
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<tr>
<td>D</td>
<td>5</td>
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<tr>
<td>E</td>
<td>3</td>
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<tr>
<td>F</td>
<td>0</td>
</tr>
<tr>
<td>G</td>
<td>1</td>
</tr>
</tbody>
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Strategic Priorities (in weighted rank order):

- B: 5
- D: 5
- A: 3
- E: 3
- G: 1
- C: 0
- F: 0
Strategic Planning Summary

- Planning, Thinking, and Objectives
- Timeframe
- Operations and Improvement
- Inputs for Planning
- Idealized Design
- Inputs → Objectives
- Prioritizing/weighting
- Development of Charters and Action Plan