Chapter Strategic Planning: A “How-to” Workshop

Kim Hodge, MSN, RN, ACNS-BC, CCRN-CMC
Clinical Nurse Specialist
Franciscan Alliance ACO
Indianapolis, IN

Kathy Peavy, MS, RN, CNS, CCRN
Clinical Nurse Specialist
Southern Regional Medical Center
Riverdale, GA

Objectives
At the end of the session, the participant will be able to:

1. Define what a strategic plan is and what it can do for a chapter.
2. Describe the steps in a strategic planning process.
3. Initiate the strategic planning process by writing one goal and objective, identifying activities that can achieve the objective, developing a work plan and designing an evaluation tool.

What is strategic planning?

- Management Tool

- Purpose: “to help an organization do a better job - to focus its energy, to ensure that members of the organization are working toward the same goals, to assess and adjust the organization’s direction in response to a changing environment” (www.allianceonline.org)
Strategic Planning

"A **disciplined** effort to produce fundamental decisions and actions that **shape and guide** what an organization **is**, what it **does**, and **why it does it**, with a **focus on the future.**"

(www.allianceonline.org)

~ PREFERRED FUTURE ~

Being Strategic

- Be **clear** about objectives…
- Be **aware** of resources…
- Incorporate both to become consciously responsive to changing environments…

Strategic Process

- It's all about planning…
- Intentionally setting measurable objectives / expected outcomes (**Preferred Future)**
- Developing an approach (activities) to achieve the objectives / outcomes
In the end…

“The strategic plan is ultimately no more, and no less, than a set of decisions about what to do, why to do it, and how to do it.”

(www.allianceonline.org)

What Strategic Planning is NOT

- Long range
- Absolute
- Rigid
- Static

Strategic Thinking

- Strategic planning is ONLY useful if it supports strategic thinking…

- Strategic Thinking is asking “Are we doing the right thing?” It has three key requirements:
  - Definite Purpose
  - Understanding of Environment
  - Creativity
Successful Strategic Planning...

- Action
- Shared vision
- Values-based
- Participatory
- Accountability to community

Successful Strategic Planning...

- Externally focused
- Quality / Excellence Driven
- Challenges the ‘status quo’
- Key to effective management / leadership

Strategic Planning Process

- Step 1: Assess Readiness
- Step 2: Mission, Vision and Values
- Step 3: Analyze the Situation
- Step 4: Develop Objectives and Activities
Strategic Planning Process

- **Step 5:** Create the Work Plan / Timeline
- **Step 6:** Implement the Activities
- **Step 7:** Evaluate / Modify

Assess Readiness

Is your chapter ready?

- Leadership Commitment

- Resources
  - Have
  - Need
  - How do you get what you need?

Mission, Vision and Values

- **Mission:** summarizes what, how and why of the organization’s work…
- **Vision:** presents an image of what success will look like…
- **Values:** underlying beliefs…

~ PREFERRED FUTURE ~
Mission: AACN

- **Mission**

Patients and their families rely on nurses at the most vulnerable times of their lives. Acute and critical care nurses rely on AACN for expert knowledge and the influence to fulfill their promise to patients and their families. AACN drives excellence because nothing less is acceptable.

Vision: AACN

- **Vision (GOAL)**

AACN is dedicated to creating a healthcare system driven by the needs of patients and families where acute and critical care nurses make their optimal contribution.

Analyze

- **Outcomes of Analysis:**
  - Quality information to make decisions
  - List of critical issues
  - Most important issues for the organization to deal with

- **External Environment**

- **Internal Environment**
External Environment

- Political
- Social
- Economic
- Technological
- Community
  - Demographics and Needs
- Legal Changes
- People Served

Internal Environment

- Chapter’s history, facts and origins
- Mission, vision and values
- SWOT (strengths, weaknesses, opportunities, and threats) Analysis

Develop Objectives

- Determine priorities
- For each priority… write objectives
- Objectives / Expected Outcomes (e.g., SMART)
  - Specific
  - Measurable
  - Attainable
  - Realistic
  - Timely
Activities

- For each objective, write activities that tell ‘how’...
- There may be several activities for each objective.
- Think about resources needed for each activity...

Work Plan / Timeline
Vision (goal) leads to objectives leads to activities...

Now it’s time to decide WHO will be the ACCOUNTABLE PERSON for EACH ACTIVITY and then WHO WILL DO WHAT TASK BY WHEN?

Closing the Loop
- Implement
- Evaluate
- Modify as needed
Let’s get to it!
Together…Stronger…Bolder

Develop Objectives
- AACN Priorities: Certification, HWE, Beacon
- For each priority…write one objective
- Objectives / Expected Outcomes (e.g., SMART)
  - Specific
  - Measurable
  - Attainable
  - Realistic
  - Timely

Determine Activities
- For each objective, write at least 2 activities that tell ‘how’…
- There may be several activities for each objective.
- Think about resources needed for each activity… What are they?
Write the Work Plan / Timeline

Vision (goal) leads to objectives leads to activities…

Now it’s time to decide WHO will be the ACCOUNTABLE PERSON for EACH ACTIVITY and then WHO WILL DO WHAT BY WHEN…

Objective Examples

1. **Certification**: Increase certification of members by at least 10% (20%) by the end of the fiscal year.

2. **HWE**: Focusing on the meaningful recognition standard, develop (2) awards to be given out by the end of the fiscal year.

3. **Beacon**: Provide education at a chapter meeting regarding the Beacon award, what is it, why it’s important, etc. by the end of the fiscal year.

Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Lead Person</th>
<th>Date of Completion</th>
<th>Comments and/or Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Issues / Resource Needs

List any issues with which the chapter needs guidance.

AACN Resources:
1. Chapter Specialist
2. Chapter Advisor
3. National Office

Evaluation / Modification

- Excellent
- Very good
- Good
- Average
- Poor

Sharing Knowledge
CONGRATULATIONS!

Contact Information
- Kim Hodge: kshodge@gmail.com
- Kathy Peavy: kathleen.peavy@southernregional.org
- AACN Chapter Advisory Team (a.k.a. CAT) CAT@AACN.org
- AACN National Office
  - Karen Certalic: karen.certalic@aacc.org
  - Mitzi Inman: mitzi.inman@aacc.org