

# Using Strategic Planning to Fulfill Your Mission

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ASPEN Leadership Development Program Nov 2020



# Outline/Objectives

- Appreciate the basics of Strategic Planning and how it relates to Mission and Vision

OR...



**Alice: Which way should I go?**

**Cat: That depends on where you are going.**

**Alice: I don't know where I'm going!**

**Cat: Then it doesn't matter which way you go!**

**Lewis Carroll, Through the Looking-Glass**

# Why a Strategic Plan?

- Provides a process of developing objectives, strategies, and tactics to ensure the achievement of the mission
- Reduce risk of 'wandering off mission' and spending time and resources on activities that do not support the mission

# What is a Strategic Plan?

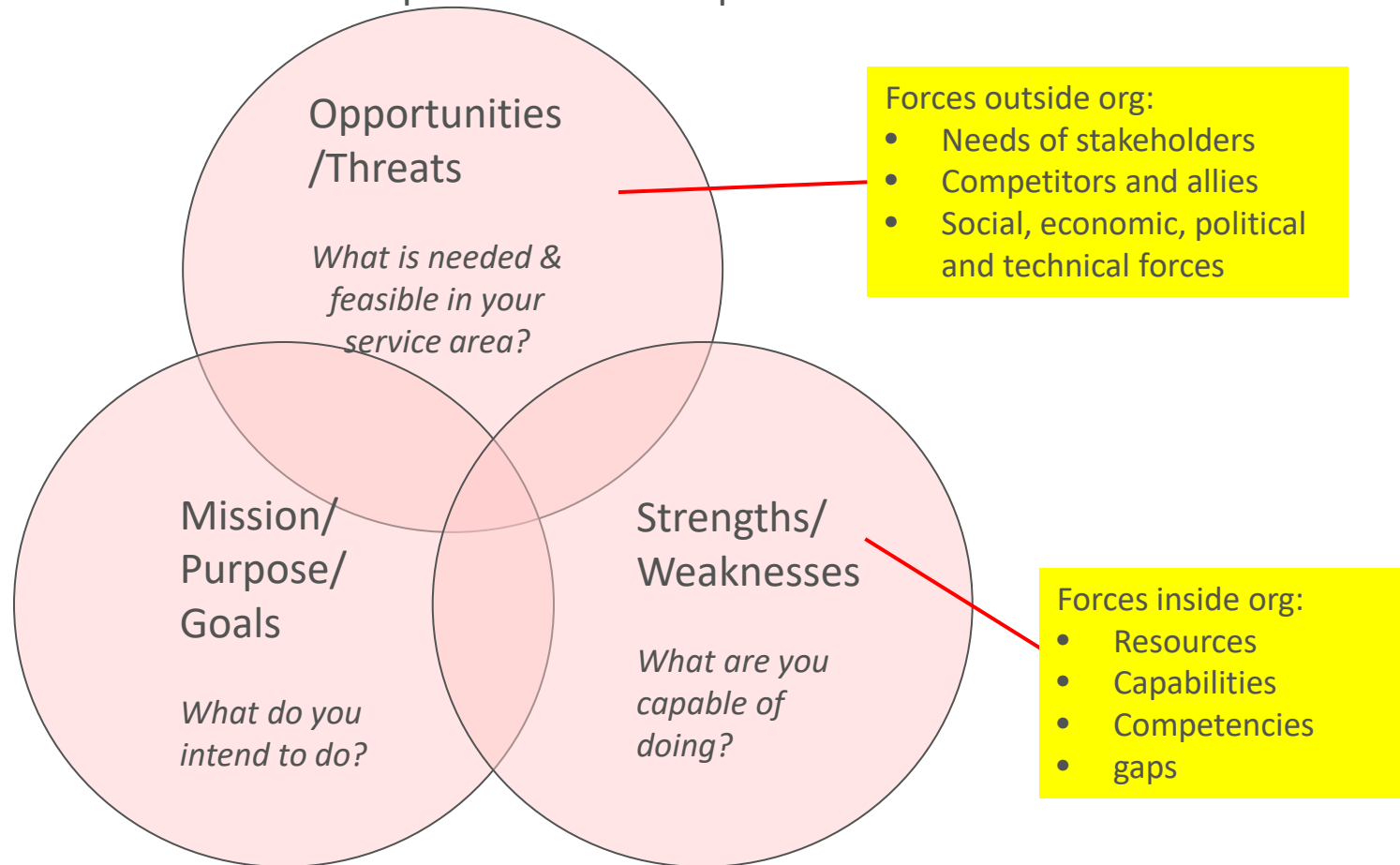
- A process by which the guiding members of an organization envision its future and develop the necessary procedures and operations to achieve that future, often in response to a turbulent external or internal environment.
- It is a blueprint that answers three questions facing any organization:
  - What will we do and for whom will we do it (e.g., programs, services or products)?
  - What objectives do we want to achieve (e.g., to fulfill our mission)?
  - How will we manage the organization's activities to achieve the chosen objectives (e.g., people, money, expertise, facilities)?

# What is a Strategic Plan?

- The outcomes of a quality planning process are:
  - a detailed work plan
  - data on internal and external assessment
  - data regarding upcoming demographic, political, organizational, and funding trends
  - updated mission and vision statements (if necessary)
  - the organization's strategic direction with detailed objectives, strategies and tactics

# Key forces in nonprofit strategic planning

Nonprofits should view this process as an opportunity to consider three sets of forces that can have an impact on both the process and overall results:



Courtesy of Susan Newton, DSP

# SWOT Analysis



Internal

strengths

weaknesses

External

opportunities

threats



# IPNA 2015 Strategic Plan – Goals and Strategies

## Raise awareness of IPNA activities

- Enhance communication with members
- Improve educational activities
- Strengthen links to other professional organizations
- Engage younger members

## Optimize resources to support IPNA's mission and goals

- Establish a central office
- Model leading governance practices
- Expand the role of regional societies in strategic and operational activities of IPNA

## Expand and diversify funding in order to ensure financial and organizational sustainability to support IPNA led initiatives

- Increase membership
- Build an international network of supporters
- Create a fundraising model

## Advance care for children with kidney disease worldwide

- Revise current teaching programs to better serve local practitioners
- Develop relationships with other scientific societies
- Enhance IPNA fellowship training programs
- Develop sister center program
- Enhance registries for the global PN community
- Disseminate best practices in PN
- Establish relationships with local health ministries where appropriate

# Benefits of Strategic Planning

- The creation of the document forces the members of the organization to make clear-cut decisions and to be explicit about them – an outgrowth of having to commit themselves in writing.
- A strategic plan has the ability to shed light on an organization's unique strengths and relevant weaknesses, enabling it to pinpoint new opportunities or the causes of current or projected problems.
- If board and stakeholders are committed to its implementation, a strategic plan can provide an invaluable blueprint for growth and revitalization, enabling an organization to take stock of where it is, determine where it wants to go and chart a course to get there.

# After the plan is rolled out, then what?

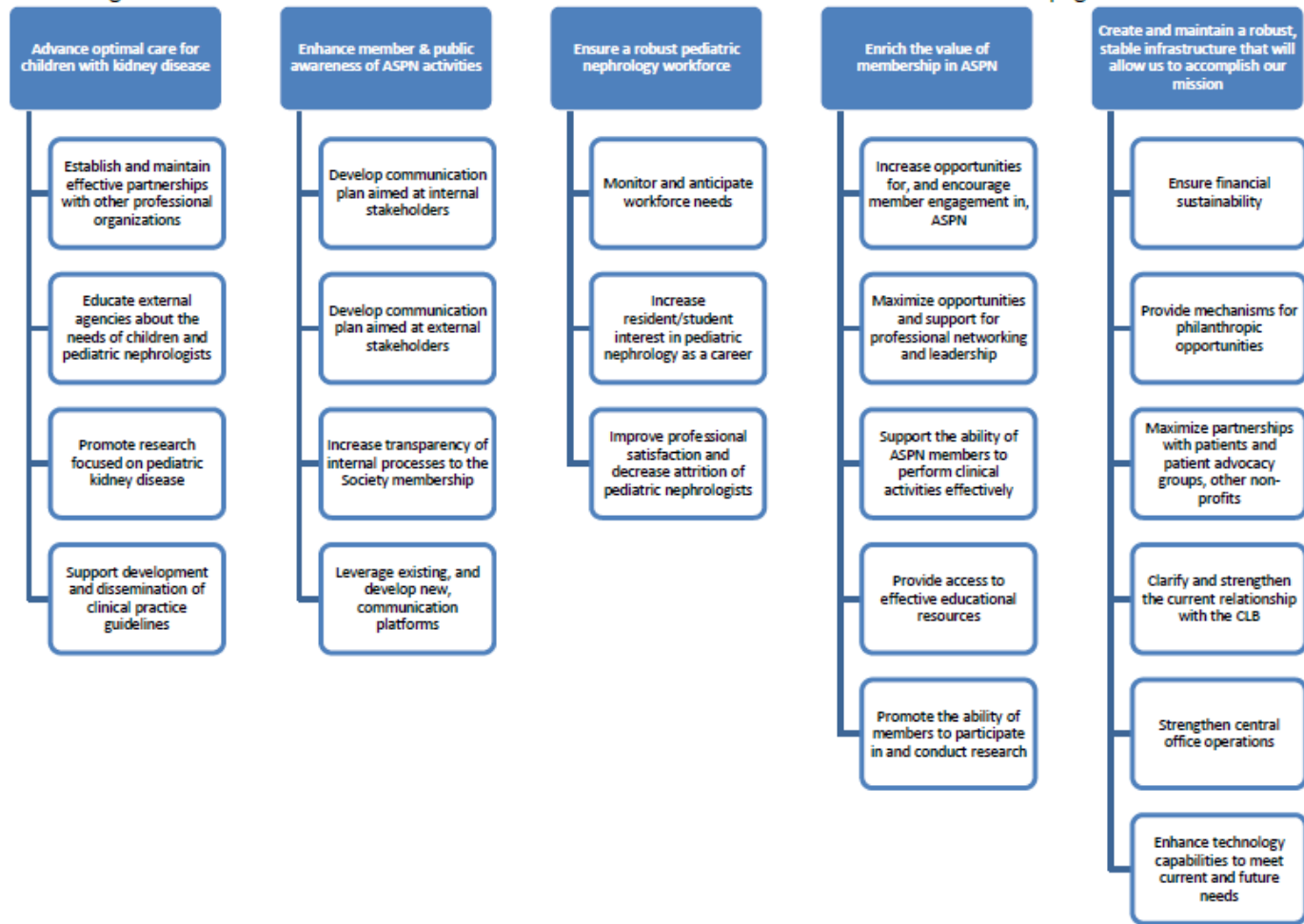
- Monitor progress as you go
- Have regular follow-up to evaluate success of the plan
- Revisit what is working and what is not working
- Be flexible and willing to adapt the plan as necessary

*A STRATEGIC PLAN IS NOT STATIC AND IS EVER-CHANGING!!*

# Tracking Progress – ASPN Example

## Strategic Map

Based on the extensive feedback and hours of discussion and work, we have identified five overarching Goals, identified in the Strategic Map below. Specific strategic initiatives and recommended action items within each of these areas are detailed in the pages that follow.



# Tracking Progress – ASPN Example

StrategicPlanByGoal062713 - Excel

File Home Insert Page Layout Formulas Data Review View Add-ins Tell me what you want to do... Flynn, Joseph Share

Clipboard Font Alignment Sensitivity Number Styles Cells Editing Webex

D95 Program Cte

|    | A   | B   | C  | D                          | E              | F              | G              | H              | I   | J |
|----|---|---|--|----------------------------|----------------|----------------|----------------|----------------|---|---|
|    | Goal  | Strategy  | Tactics  | Responsibility             | 2012           | 2013           | 2014           | 2015           | Notes   |   |
| 1  | GOAL 1: Advance optimal care for children with kidney disease | Establish and maintain effective partnerships with other professional organizations | Enhance partnership with AAP SONp Executive Committee  | AAP Liaison                | Ongoing        | Ongoing        | Ongoing        | Ongoing        |   |   |
| 2  | GOAL 1: Advance optimal care for children with kidney disease | Establish and maintain effective partnerships with other professional organizations | Explore relationship options with AST, e.g., ASPN members on each AST committee  | AST Liaison                |                |                | Q1             |                |   |   |
| 3  | GOAL 1: Advance optimal care for children with kidney disease | Establish and maintain effective partnerships with other professional organizations | Promote PN representation on every ESRD network medical review board   | Clinical Affairs Cte       | Ongoing        | Ongoing        | Ongoing        | Ongoing        | We just realized that we do not have an up-to-date list           |   |
| 4  | GOAL 1: Advance optimal care for children with kidney disease | Establish and maintain effective partnerships with other professional organizations | Ensure a PN is a member of each ASN committee/advisory group, including program committee  | Council                    | Q2             | Q2             | Q2             | Q2             | Is this in the right quarter of the year?                         |   |
| 5  | GOAL 1: Advance optimal care for children with kidney disease | Establish and maintain effective partnerships with other professional organizations | Complete policy for ASPN membership for patient advocacy groups  | Council                    |                | Q2             |                |                | Need to complete  |   |
| 6  | GOAL 1: Advance optimal care for children with kidney disease | Establish and maintain effective partnerships with other professional organizations | Maintain ASPN participation in COPS  | Council                    | Ongoing        | Ongoing        | Ongoing        | Ongoing        |   |   |
| 7  | GOAL 1: Advance optimal care for children with kidney disease | Establish and maintain effective partnerships with other professional organizations | Promote bi-directional communication with ABP  | Council                    | Ongoing        | Ongoing        | Ongoing        | Ongoing        |   |   |
| 8  | GOAL 1: Advance optimal care for children with kidney disease | Establish and maintain effective partnerships with other professional organizations | Strengthen relationship with ASN Council   | Executive Cte              | Ongoing        | Ongoing        | Ongoing        | Ongoing        | New meeting format at 2013 ASN; will need to reassess             |   |
| 9  | GOAL 1: Advance optimal care for children with kidney disease | Establish and maintain effective partnerships with other professional organizations | Establish scheduled communication between ASPN leadership and the IPNA Secretary-General   | President                  |                | Q2             |                |                | Happens biannually at Asst Sec & Council mtgs; change to ongoing? |   |
| 10 | GOAL 1: Advance optimal care for children with kidney disease | Establish and maintain effective partnerships with other professional organizations | Promote communications between ASPN PP committee and AAP Public Policy director  | Public Policy Cte          | Ongoing        | Ongoing        | Ongoing        | Ongoing        |   |   |
| 11 | GOAL 1: Advance optimal care for children with kidney disease | Establish and maintain effective partnerships with other professional organizations | Promote RPA membership among ASPN members; nominate ASPN members for RPA board positions   | RPA Liaison                | Ongoing        | Ongoing        | Ongoing        | Ongoing        | Don't think we have promoted RPA membership yet                   |   |
| 12 | GOAL 1: Advance optimal care for children with kidney disease | Educate external agencies about the needs of children and pediatric nephrologists   | Nominate ASPN members to regulatory bodies/committees such as AHRQ, CMS TEPs, NOF, etc   | Council                    | As needed      | As needed      | As needed      | As needed      |   |   |
| 13 | GOAL 1: Advance optimal care for children with kidney disease | Educate external agencies about the needs of children and pediatric nephrologists   | Explore opportunities to partner with other pediatric organizations to develop joint projects in pediatric nephrology, e.g., CHA | Council                    | Ongoing        | Ongoing        | Ongoing        | Ongoing        | Regular meetings held with CHA leadership and ASPN president      |   |
| 14 | GOAL 1: Advance optimal care for children with kidney disease | Educate external agencies about the needs of children and pediatric nephrologists   | Continue regular meetings with CMS staff   | Public Policy Cte          | Ongoing        | Ongoing        | Ongoing        | Ongoing        |   |   |
| 15 | GOAL 1: Advance optimal care for children with kidney disease | Educate external agencies about the needs of children and pediatric nephrologists   | Participate in Congressional briefings   | Public Policy Cte          | When scheduled | When scheduled | When scheduled | When scheduled |   |   |
| 16 | GOAL 1: Advance optimal care for children with kidney disease | Educate external agencies about the needs of children and pediatric nephrologists   | Continue regular meetings with elected officials and government agencies   | Public Policy Cte          | Ongoing        | Ongoing        | Ongoing        | Ongoing        |   |   |
| 17 | GOAL 1: Advance optimal care for children with kidney disease | Educate external agencies about the needs of children and pediatric nephrologists   | Review and update educational programs for ASPN members to be more effective advocates   | Public Policy Cte, Council | Annually       | Annually       | Annually       | Annually       |   |   |

Sheet1 Sheet2 Sheet3

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# How would this work for you?

- Periodically review your personal mission statement
- For each new project you take on, or request you receive, review in the context of your personal mission
  - Will this help me achieve my goal?
    - If yes, the do/say yes
    - If no, evaluate if it has other worthwhile attributes
      - An opportunity that might take you in a new direction
      - Fulfills your department/division/institution goal

# IRL Example



**Michelle Rheault** @rheault\_m · Nov 17



Replying to @rheault\_m

I started to follow a wise mentor's advice:

When offered an opportunity, ask yourself if it fulfills your personal mission statement.

For me that is-Does it improve outcomes or treatments for children with glomerular disease? For these opportunities the answer was no. 2/3



**Michelle Rheault** @rheault\_m · Nov 17



How do you decide when to accept or decline work opportunities when they are offered? What are your strategies? 3/3



# Summary

- Strategic planning is a tool to assess your mission and determine what you/your organization needs to do to achieve your/its goals
- Strategic plans are living documents that are continuously updated until it's time for a new one
- You should evaluate opportunities/requests in the context of your personal mission statement



# Questions?

