Strategic Planning Investigation

Hollie Keller and Nicole Weiser

University of Mary

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Professor: Dr. Billie Madler

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The authors review the creation of a future focused strategic plan for nurse education that will provide for the evolvement of healthcare trends. The first step in the strategic plan was to gather data and do an analysis of the information. This analysis came up with four critical success factors which are, financial, customers, internal processes (accountability), and learning and development. There were goals made for the plan as well which were develop an environment that motivates achievement of excellence by faculty, create innovative curriculum, and embed sustainability in the curriculum. The second part of the strategic plan was to identify priorities and implement initiatives. This was done by a different group of faculty in order to obtain a new diverse skill set and to promote broader engagement.

This method of strategic planning builds a foundation to promote change to provide for success in undergraduate nursing programs. The way faculty were involved provided for a unique vision that will help to have a maintainable plan for the future of this particular nursing program. The information in this article was accurate. The findings that built the strategic plan were dependable, confirmable, transferable, and authentic which are all criteria for a quality qualitative inquiry. This study was a level six on the hierarchy of evidence.

This article was very informative and accurate about a specific strategy used to build a strategic plan. A strategic plan was discussed throughout the article for the use of a simulation lab. The strategic plan was built using the strengths, weaknesses, opportunities, and threats (SWOT) analysis. Along with looking at SWOT analysis there was objectives made out for the strategic plan to guide the building of the simulation plan. The processes for the strategic plan were broken down into vision, business planning, stakeholder buy-in, facility construction, and equipment needs such as purchasing, training and curriculum. The authors also discussed the importance of not only building a solid strategic plan but the importance of reviewing strategic plans. Review helps to maintain a fresh plan and can build objectives for further strategic plans.

This article was extremely relevant to the topic of strategic planning, the author had a great discussion of SWOT analysis which is a commonly used tool for strategic planning. This was a quality source that is transferable to nurse educator programs as well as many other programs that need strategic planning in order to better their productivity. It provided a strong portrayal of one way to building a strategic plan. This was a level 6 on the hierarchy of evidence because it was a descriptive study.

Kurec looks at the importance of developing a strategic plan in a laboratory setting. He also explains the need for having a mission and vision but that a strategic plan also provides a framework to guide an organization in reaching goals. Two different approaches to strategic planning are discussed, which include issue based strategic planning and vision based strategic planning. Both can be beneficial in a certain setting but issue based strategic planning is focused on a specific change or issue occurring and vision based strategic planning is focused on reaching future goals. Kurec then goes on to describe steps involved in starting a strategic plan. These include setting goals, setting a timeline, those involved in making the plan, identifying tasks, developing the strategic plan and completing the process. This format for developing a strategic plan gave a clear layout of the steps needed in the process along with specific techniques to use throughout the process to make the process thorough but clearly defined. The process and steps in this article can be carried over to other areas implementing a strategic plan.


Zuckerman explains how in an ever changing healthcare system, it is easy to focus on the immediate concerns and issues and ignore the need for a strategic plan. However, having goals and a vision for the future is definitely needed especially in this time of healthcare reform. Zuckerman goes on to explain a few reasons strategic planning is needed in today’s health care including the need to allocate scarce resources; the need for alignment of larger, more diverse organizations and; the need for adaptability in the midst of uncertainty and change. In today’s healthcare strategic planning is being turned into a more dynamic strategic management process. This process not only focuses on growth of an organization but will also need to focus on scaling up which may include mergers and partnerships to survive financially, being cost competitive to compete in the healthcare market yet give value for the patients, demonstrating quality as payment is now being largely based on quality outcomes, providing patients exceptional service as healthcare is a service business and lastly, integration of all parts of an organization. The changes or reforms present in healthcare and the need to focus strategic planning or management on more than growth were valid, and relevant information. The information in this article can be used to better understand the future focuses that need to be taken into consideration when developing a strategic plan.
Part 2: Strategic Planning Case Study

Case Study 7-1 Creating a Common Nursing Vision and Strategic Priorities across a System (Roussel, Thomas & Harris, 2016)

1. **What lessons are learned from reviewing the strategic plan and progress made in XYZ HS?**

   A lesson learned is the importance of nurse leader’s involvement in strategic planning. Nurse leaders have the knowledge and understanding of the needs and changes occurring in healthcare. To grow, compete and improve outcomes for patient’s a nurse leader’s involvement is key in the strategic planning process. As Roussel, Thomas and Harris (2016) explain, “Nurse leaders need to be actively involved in the strategy development and execution for the organization because nursing is an integral part of any patient care activity” (p. 149-150).

   A second lesson learned is the importance of focus, commitment and accountability when developing a strategic plan. In a large organization such as XYZ HS, the focus of numerous nurse leaders was needed to evaluate the current situation, identify what was important and develop priorities for the future of their organization. Once the three priorities were identified it was then up to the nurse leaders to be committed and accountable for these priorities to make them a successful part of the strategic plan.

   Lastly, the use of appreciative inquiry (AI) is beneficial in developing a strategic plan. With AI nurse leaders can develop work for the future with opportunity and curiosity rather than negatively and looking at failures (Roussel et al, 2016). In developing a strategic plan and using AI, nurse leaders look at the positives from past and current experiences to build on for the future.
2. What factors were most significant in driving 47 diverse hospital nursing leaders toward a common vision and strategic priorities?

A few significant factors in driving 47 diverse hospitals nursing leaders toward a common vision and strategic priorities was the fact that XYZ HS was continuing to grow and the nurse leaders felt the need to be prepared for the reformed future of healthcare. Having the 47 diverse hospitals aligned with a common vision and strategic priorities would guide change as they continue to grow and better prepare them for the future of healthcare. A strategic plan is the blueprint that leads to success in the future for organizations (Roussel et al., 2016). For them to be successful in the ever-changing world of healthcare they need to have a clear plan to remain competitive in the future.

3. Of the key steps articulated, which do you think were most important?

The step that was most important was identifying strategic goals in the small work groups to bring to the full group of nurses. The building of these strategic goals was the base work for the ultimate strategic plan across XYZ Health System. According to Roussel et al. (2016), “Planning is a continuous process that starts with setting goals and objectives, followed by laying out a plan, reviewing processes and outcomes, and concluding with feedback to staff” (p. 155). Based off of this quote it is clear that the first and most important step is building goals which is exactly what was done in this particular case study.

Every step of this planning process is important, even evaluation after implementation of the plan. However, the other most important factors discussed in this case study were the voting amongst the full group on three system-wide nursing priorities. This provides for a firm strategic plan. The utilization of an empowered work team for execution of the strategic
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plan is also a key factor in a successful start of the implementation. Without this hardworking group, the implementation could potentially be ineffective.

4. **Are there other steps that you would advise employing in this process?**

   Two major components of change leadership are developing the strategic plan and then making sure the change is successfully executed (Roussel et al., 2015). The scenario had discussed a team built for execution of the plan, but it did not discuss the actual execution plan to be sure it is successful. Even if there is a team for execution, unless it is properly planned the process for change may not be successful. Another step I would advise is building an implementation plan for the strategic plan. Stakeholders need to commit to the change, awareness and complete understanding of the change needs to be in place for the implementation team, belief in the change from the team, and commitment to the change are all necessary in building the execution plan for the strategic plan implementation (Roussel et al., 2016).

5. **How does size and scope help or hinder strategic success?**

   The large size of the health system in this case study can both help and hinder strategic success. It can help because the more people involved the more ideas there may be to shed light on the topic for the strategic plan. However, the many insights can also be a hindrance because of the 47 diverse hospitals may not see eye to eye on a common ground of what will work best for all the facilities. Visions and goals may be hard to build because of the varying populations that all 47 facilities involved in this strategic plan are trying to accommodate. “The vision statement is created with the customers’ needs in mind” (Roussel et al., 2016, p. 153). If the health care system involved was smaller and in a more centralized location, it may be even easier to build a strategic plan for success.
Part 3: Application

1. **What is the purpose and components of a strategic plan?**

   The purpose of strategic planning is to organize activities of priority, strengthen operations, work together towards a goal, and adjust to changing environments ("Strategic Planning," 2016). This plan serves as a blueprint to build the way an organization succeeds. The plan should include ways of review and adjustment of the strategy to keep up with any needed changes of the organization. Kurec (2014) explain, “a strategic plan involves a process that ensures an accurate understanding of the overall mission and vision of the organization, but also a framework of action steps that guide leadership in achieving goals” (p. 16). A strategic plan includes a mission, vision, values and objectives.

   The mission of an organization describes the purpose of that organization. In a strategic plan the mission is listed in a mission statement. As Roussel et al. (2016) explain this is a concise statement of the organizations reason for being and it gives meaning as to why and what that organization does. The vision looks to the future of an organization and what image the organization is trying to create for themselves. The vision is always made with customers’ needs involved in the decision making process. The vision is ultimately an image for a successful future that is hopefully going to be created through the organizations strategic plan (Roussel et al., 2016). The values of the strategic plan are the concepts that drive the organization and inform the mission, vision and goals (Roussel et al., 2016). Value words such as dignity, service, and caring give meaning to what we do in the organization. The last main element of a strategic plan is the objectives for the plan. These are result statements that can be measured and are very specific to the organizations overall goal (Roussel et al., 2016). Objectives need to have meaning behind them as well as relevancy and functionality in order to be helpful in a productive change.
Strategic Planning for an organization. Written objectives for a strategic plan usually include resources used, staffing, supplies needed, educational programs, innovation, and evaluation (Roussel et al., 2016).

2. **Through the use of the references utilized for the annotated bibliography to support your thoughts, discuss how you have witnessed/participated in this level of healthcare strategic planning.**

   a. If you have not had experience with this form of planning, what insight have you gained from this case study and supporting resources that could support your organization in the event of a change in their strategic plan?

Nicole Weiser response: Though I have not been a part of the process of developing a strategic plan I feel from reviewing the case study and references used for this assignment I have gained important insight into the development of a strategic plan. Specifically, the article by Kurec (2014) gave me a good understanding of the process needed to develop a strategic plan. Kurec (2014) focused on the 6 steps involved in developing a strategic plan. If my organization was to change our current strategic plan, I would be well informed of effective steps in the process to help with this development. Zuckerman (2014) went into further detail about the important focuses needed in developing a strategic plan in a reformed healthcare system. As Zuckerman (2014) explained, historically we have been focused on growth when developing a strategic plan but with the changes in our state of healthcare reform we must also focus on organizations scaling up, being cost competitive, focusing on quality and exceptional service and on being an integrative organization for our patients. The article by Zuckerman (2014) has better prepared me for the changes that are important in health care reform and how they may affect the development of a strategic plan. The case study in Roussel et al. (2016) gave an example of a
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healthcare systems development of a strategic plan. This showed me the importance of
developing a strategic plan to unite a healthcare system and the need for having nurse leaders
involved in this development. I also found interesting how they managed to focus and engage so
many nurse leaders using appreciative inquiry and shared leadership to develop and agree on 3
strategic priorities. Lastly, the case study helped me to understand the need for commitment and
accountability throughout the entire process to make it successful. Developing a strategic plan
can be time consuming and complicated but by using strategies from this research and case study
I can be better prepared to contribute to and support a strategic plan in the future.

Hollie Keller Response: Personally I have not been involved in building a strategic plan,
but I have witnessed strategic plans implemented into practice. Therefore, I have experienced the
implementation after all the leg work for the strategic plan. I have been informed of goals of the
strategic plan and the objectives that were thought out based on a SWOT analysis to reach the
goals. The strengths and opportunities for growth found in the SWOT analysis are the basis for
the objectives built for a strategic plan (Gantt, 2010). The particular plan that I know I have been
a large part of is becoming Joint Commission certified in a disease specific area, specifically
total joint replacements and hip fractures. This change all started when our organization decided
to try to keep pace with other healthcare facilities. Future focused strategic planning requires
advancement of evidence-based education, keeping pace with evolving healthcare trends, and the
changing practice for nurses (Evans et al., 2014). The people involved in the strategic plan
development brought forth the ideas of objectives and goals in order to become disease specific
certified through Joint Commission. Their plan has been implemented slowly over the last two
years. First the changes involved the way nurses cared for total joint replacements. The main
changes made to meet goals of decreasing length of stay and increasing pain management, were
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medication regimens and the way physical therapy was executed. All staff through many departments were educated on this change in order to have a successful implementation of the strategic plan.

The success of this plan implementation has been continuously evaluated through scores that are kept by members of the strategic planning team. They have been evaluating and adjusting the plan for the last two years. Reviewing and updating the plan on a regular basis assists in keeping the plan fresh and current for those that guide operations (Gantt, 2010). It is just in the last two months that the application for Joint Commission Certification was actually sent because the organization feels that they have enough data to prove that they are improving quality care and still have more plans in place to improve further. This has been a positive experience with strategic planning and has proven to me that this process really can work if done in an appropriate way with the right individuals involved.

3a. Thinking back to what we have studied so far in this class; how does Complex Adaptive systems play into successful strategic planning?

Complex adaptive systems are built from relationships between agents, influences, and forces (Roussel et al., 2016). The most important part about a complex adaptive system is that each part of this system understands their function within the system. The relationships among different disciplines in complex adaptive systems are a very crucial part of successful strategic planning. Everyone must understand what their part is when building the plan for change.

Healthcare is a complex adaptive system and a strategic plan that can withstand the changes and chaos that comes with this system will be successful in guiding an organization’s future.

3b. Do functions of system’s thinking, shared governance, clinical/nursing informatics support the endeavor of strategic planning?
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Systems thinking is definitely supportive of strategic planning. As Roussel et al. (2016) explain, system thinking involves understanding how one area influences the whole. Leaders need to understand they are only part of the bigger picture in health care and their involvement, participation and understanding influence the outcomes of the whole organization. The five keys to systems thinking are knowing the decision to be made, how the decision will be made, the timing of the decision, and how, when, and to whom the decision will be communicated (Roussel et al., 2016). These are all good questions to incorporate into strategic planning as well. How the decisions are made is a major part, of strategic planning, will there be a vote on the best ideas for objectives, or is there one person that ultimately decides? These are all ways of systems thinking. Systems thinking as well as strategic planning needs to have a focus on who all will be affected by this plan or change, without these considerations making a change may be difficult. As leaders we need to understand the strategic plan, how it affects our area or discipline but also how we fit in the bigger picture of this plan in the future.

Shared governance supports strategic planning as well. Shared governance is the focus of collaboration between direct-care nurses and leadership at an organization (Roussel et al., 2016). Combining the logic behind day to day workflow with the leadership qualities may build a stronger strategic plan to improve the organization. Also by involving direct-care nurses in the strategic plan and process using shared governance they will be better engaged and accepting of the strategic plan.

Lastly, clinical/nursing informatics also supports strategic planning. Clinical and nursing informatics is a department that focuses on information technology to improve outcomes and bridge the gap between clinical practice and the use of information technology (Roussel et al., 2016). This department will support strategic planning in the planning stage as well as the
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evaluation stage. In the early planning data can be pulled electronically to see where areas of improvement are needed. After the plan is implemented informatics is important to monitor trends of how the change is doing, whether it has been successful or not.

3c. **What challenges, barriers, or even unforeseen opportunities may result from with strategic planning?**

The largest challenge or barrier in developing a strategic plan is in the execution of the plan. “A lack of staff engagement in the planning processes is one of the major reasons that strategic planning fails” (Roussel et al., 2016, p. 150). The planning of a strategic plan can be difficult and time-consuming but the largest barrier occurs if staff are not engaged in the execution of the plan. Another challenge in the process of strategic planning is the uncertainty of the healthcare system. Healthcare is ever-changing and leaders need to be ready and willing to shift the strategic plan to meet the political, technological, societal and regulatory landscapes as they change (Roussel et al., 2016). Some other challenges to strategic planning could be fear or negative attitudes towards change. With all the people involved in the planning process the organization may run into communication barriers. Poor communication will make it difficult to reach common ground when building goals and objectives. There needs to be a strong leader involved, if the leadership piece is missing, the planning may be stalled or unsuccessful. Clear cut responsibilities split between all individuals involved can help with success of the planning procedure. Though there are many challenges in strategic planning unforeseen opportunities may arise as well. As goals and priorities are identified new processes, technologies, mergers, best practices and initiatives may develop to improve the organization and patient outcomes.
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References


