

STRATEGIC GROWTH FOR HEALTH CENTERS

A Board Perspective



Presented By

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“Never doubt that a small group of committed citizens can change the world. Indeed, it is the only thing that ever has.”

Margaret Mead

“Never doubt that a small group of committed citizens, without appropriate planning, can truly screw things up!”

Julie Bodën Schmidt



Overview

One of the critical roles of the board: ensure effective organizational planning

Strategic planning – what is it? A process by which an organization determines where it is going over the next year or more (usually not more than 3 years), how it's going to get there, and how it will know if it got there

When should it be done?

- ✚ Just getting started
- ✚ Preparation for a new major venture (growth)
- ✚ Once every three years to ensure an evaluation of the agency and the environment, and to develop a basis on which annual plans are made

FOCUS TODAY WILL BE ON PREPARATION FOR A NEW MAJOR VENTURE/GROWTH

What kinds of growth might you plan for?

- New site
- New service
- Expanded services
- All of the above!

MAJOR PLANNING STEPS

1. WHY ARE YOU DOING THIS?
(Often the forgotten step)



2. WHO IS TAKING THE LEAD? Get organized –
select an individual or group to keep the
planning on track; outline the process.



3. WHERE ARE YOU? Assess your organization and the environment – SWOT.



4. WHERE ARE YOU GOING? Set your direction.



Develop and refine a plan.



**5. WHAT TO EXPECT WHEN YOU GET THERE:
Implement and evaluate!**

PLANNING SPECIFIC TO GROWTH

STEP 1: Be sure everyone is clear as to why you are considering growth.

- ✚ Response to the direction set by Access for All America – to double the number of patients served by CHC’s by 2015
- ✚ Response to a growing need
- ✚ Response to a change in the environment
- ✚ Need to grow for other reasons – *what might they be?*
 - Federal pressure to increase users
 - Need a larger infrastructure and therefore must grow to support
 - Need a larger base of providers to make call manageable



STEP 2: Who is going to take the lead? How are you going to organize your planning?

- ✚ Staff driven?
- ✚ Participatory?
- ✚ Some combination of both?
- ✚ Use a facilitator?
- ✚ Who will manage?
- ✚ Who will provide administrative support?

Helpful Hints

It's a mistake to leave out your chief executive officer and other senior managers – they know what is happening on a day to day basis.

Make sure you have some experts (experience, dedication and skills) on your team depending on the type of growth you are considering.

STEP 3: Assess your organization – SWOT.

Internal assessment – strengths and weaknesses:



- # Leadership
- # Relevancy of services provided
- # Adequacy of current facilities
- # Financial systems and position
- # Diversity of funding sources
- # Ability to recruit and retain staff
- # Fund development history

It is difficult to build on a weak base!

External assessment - opportunities and threats

- + Funding opportunities/potential cuts
- + Competition
- + Degree of support from community, elected officials, public funding agencies

Obstacles to consider:



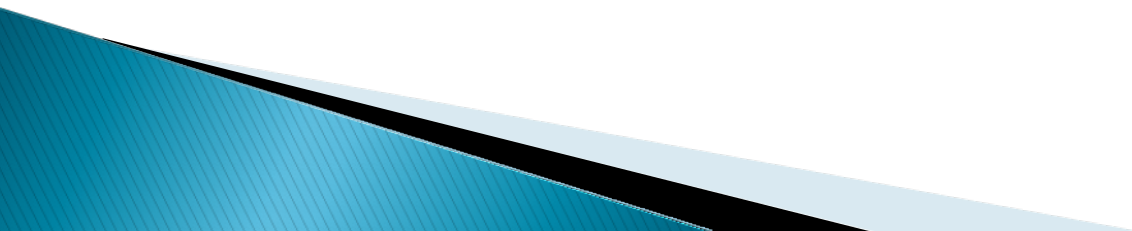
- ✚ Resistance to change
- ✚ Lack of risk-taking
- ✚ Isolation of the agency – no outside support
- ✚ Inability to address internal or external challenges or changes
- ✚ Lack of funding
- ✚ Lack of expertise
- ✚ Inadequate communication mechanisms



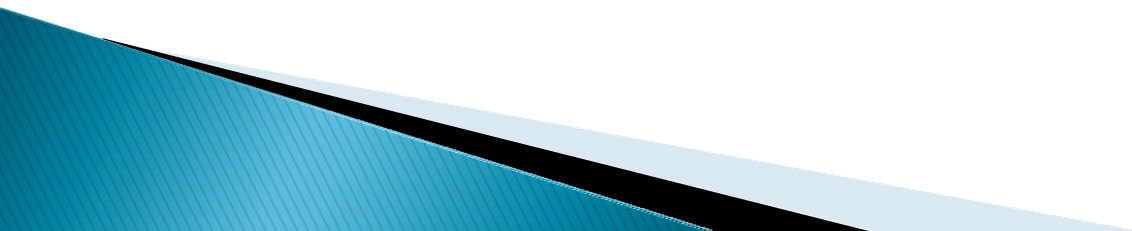
Take a deep breath and consider what you have just reviewed before going forward!

STEP 4: *TIME TO DEVELOP A STRATEGY!*

A. Select a planning approach:

- ✚ Scenario approach
 - ✚ Critical issues approach
 - ✚ Goal approach
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B. Draft and refine your strategic plan:

- ✚ Agree on a format
 - ✚ Develop a first draft
 - ✚ Refine the plan
 - ✚ Adopt the plan
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CRITICAL ISSUES TO CONSIDER

✚ Financing

- Capital
- Operations

✚ Workforce

- Physicians
- Nurses
- Dentists

STEP 5: Implement the plan!

- # Monitor progress
- # Make changes as necessary
- # Update the plan as necessary



SUMMARY

- ✚ Follow the outline – but don't be afraid to adapt for your organization.
- ✚ Seek assistance if you think it will help.
- ✚ Don't hesitate to contact me:

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Intermission

NEXT UP:
LUNCH

