Strategic Plan Review

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 Strategic plans are the blueprints of an organization for the future success (Roussel, 2016, p. 149). It’s essential for nursing leaders to develop and utilize their ability to provide successful strategic plans. Leaders must utilize literature to support the methods and interventions within  the successful strategic plan.  The ability of the strategic plan to work in complex adaptive systems is assessed by leaders using systems thinking.  To ensure implementation of the strategic plan staff engagement toward the mission of the organization is needed.  Leaders who use systems thinking to create a strategic plan will support their staff, provide the essential tools for success and set attainable goals that align with the objectives of the organization.  Utilizing systems thinking by organizational leaders to create strategic plans will ensure the success of an evolving healthcare organization (Roussel, 2016).

**Strategic Planning Resources (Part 1)**

**Annotated Bibliography One**

Cummings, T. G. (2006). Execution: The discipline of getting things done. *The Academy of Management Perspectives*, *20*(1), 129-132.

 Ensuring an organization is ready for a necessary change is half the battle and making sure everyone has the necessary tools for the change is the other. Leaders guide the organization in the direction for success, without a leader’s guidance, or lack-thereof, the chance of success immensely decreases. This article discusses the critical need for implementing execution into the organization’s culture. Providing strategies for successful execution of changes is partial to decreasing the amount of failures. The leaders of the organization set goals, implement strategies for changes, and fail to successfully execute. The execution process rests heavily on the shoulders of the leaders, without a successful strategy on the execution of the change, the likelihood of a successful change diminishes. Developing a way to instill successful execution into the organization’s culture is imperative to the continuing success.

**Annotated Bibliography Two**

Evans, C. J., Shackell, E. F., Kerr-Wilson, S. J., Doyle, G. J., McCutcheon, J. A. & Budz, B. (2014) A faculty created strategic plan for excellence in nursing education. *International Journal of Nursing Education Scholarship.* 11(1). 1-11. doi:10.1515/ijnes-2013-0066

 Academic institutions have been required to adapt their curricula to meet the needs of the ever changing healthcare systems to include strategic planning for nursing education.  Process is presented that was created by faculty to be engaged as they create strategic plan for a nursing program.  Phase one developed at strategic plan preparing for upcoming accreditation.  Phase two, four team members served as collective memory for the initial work.  There is evidence that there is a practice gap between education and the expanding scope expected of the nurse.  New teaching and learning expectations, financial pressures, lack of clinical opportunities, and faculty shortage are factors that influence the shortcomings of education.  An innovative pluralistic approach to analysis of the nurse education program was hypothesised to be essential in creating a more effective strategic plan.  Methods began with literature search related to strategic planning and organizational change that used 20 resources of books and articles.  The literature review supported the need for education and organizations to align their vision and mission for the future of nursing.  There is a highlight of importance to get the right people and leaders involved who are focused on the a mutual goal.  The strategic goal directs the nursing education program to prepare students to be evolving in their practice environments during education and their future.  Strengths were identified as leadership qualities, stakeholder involvement, and analysis of internal and external factors.  Areas for improvement included delivery of evidence based literature, technology, and faculty willingness to engage in transformation.  To execute the plan the group identified the cultural shift and attributes required to support the strategic plan.  Challenges of the strategic plan included decreased participation from staff, lack of external stakeholders and a publicly documented plan will be published in the next phase.  Reflecting and revising was found integral to the process.  This collaborative method of strategic planning promotes future positive culture change critical to a nursing education and career.

**Annotated Bibliography Three**

Falk, N. L. (2015). Strategic Planning and Doctor Of Nursing Practice Education: Developing Today's and Tomorrow's Leaders. *Nursing Economic$*, *33*(5), 246-254.

This article discusses the importance as well as the benefits of our nurse leaders being provided education on how to develop a strategic plan and play an active and competent role in the strategic planning process in their practice. By educating the nurse leaders, they will be better prepared to have the strong voice of nurses heard throughout the spectrum of healthcare and the changes that are continually faced.  George Washington University (GW), offers a three-credit course called “The Health Care Enterprise”, which is required for all their DNP students.  The decision to require this course within the program was made to better prepare students for the strategic thinking that is required with the accompanying professional responsibilities that are necessary in the professional roles of nurse leaders. (Falk, Garrison, Brown Pintz, Bocchino, 2015).  The focus of this course is to utilize the Bloom’s Taxonomy and start from the ground level and gain the knowledge to build and develop a working strategic plan.  The incorporation of this process within the educating of DNPs can prove powerful in the developing of nurse leaders to ensure a stable and healthy future for patients, families and society in general (Falk et al., 2015).

**Annotated Bibliography Four**

Martin, J., McCormack, B., Fitzsimons, D., & Spirig, R. (2014). The importance of inspiring a

shared vision. *International Practice Development Journal*, *4*(2), 1-15.

 The article explains the reasoning behind having a common vision among nursing leaders to develop strategic plans.  The future of nursing is moving towards a collaborative effort among the nurse leaders to be more involved in the health system.  Health systems need effective nurse leadership to sustain high-quality patient care & safety, reducing cost, and adapting to the change happening frequently in health care.  Nurse leaders are taking on larger roles and need to be on the same page as one another to be effective.  A common vision among the leaders is a must for the future of health care.

**Strategic Planning Case Study**

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

The biggest lesson learned from the review of XYZ HS is that it takes the effort of an entire team of nurse leaders to accomplish the task at hand and requires commitment and accountability as well as time and focus.  The health system valued the talents they possessed within their team and looked at the challenge as a whole involving all the nurse leaders to identify the issues and work at resolving those issues.  The whole process of implementing a strategic plan takes time and due diligence and by dividing teams and empowering them to work towards a common goal is what helped them achieve success.  In the case study nurse leaders from all 47 diverse hospitals came together to identify three new strategic priorities the health system needed to implement.  It takes a common vision among the nurse leaders to get those strategic priorities developed. Another important lesson learned in the case study is that when goals are achieved, however large or small, these need to be communicated and celebrated facility wide.  By doing this, all staff will understand the commitment and dedication by those that are driving the strategic plan, which in turn will make the effort feel worthwhile.

1. **What factors were most significant in driving 47 diverse hospital nursing leaders toward a common vision and strategic priorities?**

Three factors were fostered in driving the common vision and strategic priorities for the XYZ HS.  These factors were focus, commitment, and accountability.  The focus was used to identify the common goal among the nurse leaders within the 47 diverse hospitals. The appreciative inquiry (AI) approach was used during the strategic planning process, which was used to integrate feedback and information.    The AI approach allowed for XYZ HS to encourage the leaders to explore and develop the work of their future with a more personal approach to promoting their vision.  Next, commitment is encouraged among all health system staff to move the vision forward.  Lastly, accountability among everyone involved to empower each other to achieve the common goal.  These factors helped promote the common goal of the health system.  Nurse leaders used the common vision develop and implement the strategic priorities.

1. **Of the key steps articulated, which do you think was most important?**

The vision that inspired the strategic plan was very important, and without a vision on the ground level, the ability to carry out the the planning process would prove difficult if not impossible,  The nurse leaders clearly understood that XYZ HS was striving to provide healthcare to the patients it served that was just, safe, and infinitely humane.  By competently creating a vision and presenting it to the nurse leaders they were able to inspire and produce a positive energy within the organization to work towards the common goal of providing quality healthcare.

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

A next step for XYX HS in this process would include monitoring the outcomes and making adjustments as needed.  Patient satisfaction surveys are a valuable tool that will be very useful in the monitoring process.  Survey questions should come directly from your organization's goals in order to be able to accurately portray success or failure as your work to achieve your goals.  Providing and sharing all feedback with the staff is crucial in the success and will continue to keep staff engaged in working towards the larger goals.  Another step I would advise is, celebrate with all levels of staff when goals are reached or satisfaction scores increase.  Strategic plans will not be ultimately successful if the leaders do not communicate the goals and celebrate with the entire team, and not just the leaders.

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

The size of the organization does have advantages and disadvantages when developing a strategic plan.   With a larger group of people it can be challenging to focus and agree on strategic priorities.  However, a smaller group may not have the experience or knowledge to apply the vision into the strategic plan.  With the group being small the leaders could focus more on certain ideas.  The size and scope depends on whether the leaders come together as a whole and share the same vision.  Once the group whole  ideas can be expressed, developed into priorities, and implemented into the health system.  Size and scope can help or hinder strategic success but it falls on the leaders to see the big picture of the health system.

**Application**

**Purpose of Strategic Planning**

The future of an organization is defined by means of strategic planning.  The strategic plan emphasises the organizations mission, values, philosophy, and objectives while determining an implementation plan that takes into consideration capital and human resources.  The mission, values, philosophy and objectives must support each other and be utilized by the organization at differing agency levels.   The strategic plan converts the mission, values, and philosophy in to an action plan that is adaptable to the changes of the organization's future.  Purpose of strategic planning is to give direction, cohesion, and thrust to the nursing division (Roussel, 2016, p. 356).  When implemented with sustainability at time of implementation and the future there is results in productivity, profitability, and achievement.  Planning is required to make action in a business.  The use of planning gives sequence of activity, and prevents undesirable change along with using resources wisely.  Planning focuses on results achieved and evaluation of alternatives to achieve the same or better results.  Strategic planning is needed to create an environment of high quality practice using evidence based decisions and meeting the clients’ needs.  Although the strategic planning emphasizes conceptual process of mission, philosophy and organizational objectives, the planning translates into purpose with specific details of measurable actions.  The process for creating strategic plan begins by identifying a major organizational problem and visualize the resot desired.  Internal analysis of markets, products, customers, employees, finances, technology, standards, and community help in identifying major problems and possibly their cause.  Outside influences must be examined as they relate to the organization.  Large issues that have long-term impact and are important to the organization should have focus and attention by creating a strategic plan.  The plan should include setting a goal of time to accomplish the desired change.  Mental process must use valid and reliable resources of data to develop objectives, determine resources required, and create steps of action for achieving objectives along with presentation of action plan to staff.  A major component of the strategic plan is using resources of personnel, supplies and equipment in the best way possible to use their max potential and minimize cost.  The action plan should include activities, assignments, deadlines, and measurement of accountability.  The adaptable operational planning must be considered daily, weekly, monthly and yearly to ensure adjustment is made for unforseeable change and is guaranteed to occur (Roussel, 2016).

1. **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.**
	1. **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?**

Organizational success starts with a shared vision and effective leadership is crucial for strategic planning, improving patient care, and cost effectiveness. Inspiring a shared vision is an essential element of the change processes regarding orientation, and engaging the whole organization towards excellence (Martin, McCormack, Fitzsimons, and Spirig, 2014). Aligning an organization’s vision and mission with its objectives and initiatives is the foundation for a strategic plan. Nurse leaders are to provide insightful, goal-oriented direction, and assist the organization in becoming dynamic and competitive in the future (Evans et al, 2014).

Working for healthcare organizations, you witness and participate in many forms of strategic planning. With the continuous evolution of healthcare, developing plans for the success of the organization are going to be imperative. For organizational success, there needs to be substantial social interaction amongst members, because this interaction is the mode through which the successful execution of strategies occur (Cummings, 2006). Organizations have hired companies to assess its functionality. Meetings are held to discuss the information gathered, discussions on how to improve the areas of concern, and changes are then implemented. Nursing leaders benefit from learning how to think and manage strategically, and when strategy skills are acquired, nurse leaders are better equipped on how to plan efforts within the organization (Falk, 2015).

1. **Thinking back to what we have studied so far in this class, how does Complex Adaptive Systems play into successful strategic planning?**

Roussel (2016) stated, “A complex adaptive system is often characterized by dynamic relationships among many agents, influences, and forces” (p. 116-117). The leader’s ability to manage change through the complex adaptive systems (CAS) is essential towards strategic planning, along with the success of the organization. Leaders within the organization need to adjust and acclimatize their behavior to support their staff, to engage staff in the mission, and to be conscious of the need for change (Roussel, 2016). Nurse leaders are involved in the strategic development and execution for the organizations, as they are an essential part of patient care activity (Roussel, 2016). CAS is crucial to the success of strategic planning, it would be very difficult to have a successful organization without one or the other.

**Functions supporting Strategic Planning**

Systems thinking is a conceptual way of thinking about system dynamics.  Interrelationships rather than linear cause and effect is an essential concept of systems thinking.  This way of thinking includes all departments and all levels of leadership and staff in decision making (Roussel, 2016, p.591).  Strategic planning can relate to systems thinking as both must be able to adapt to an always changing future of business and healthcare.  Shared governance utilizes leaders from multiple levels of the organization and all departments to promote patient outcomes and worker satisfaction.  Additional benefits of shared governance include empowerment, practice outcomes, staff autonomy and productivity toward organizational goals.  The benefits of shared governance share objectives with systems thinking because worker satisfaction leads to retention, motivated staff and an ability to readily adapt to change.  As shared governance includes the staff who will be implementing to change there is an investment to buy-in to the decision of change along with motivation to maintain the practice change.  A change that all organizations have adapted to in the last few years is utilization of informatics.  Electronic health records have allowed for rapid data collection in large quantities.  It is important that systems thinking is used during the strategic planning process and includes how the entire organization and all staff will interact with each other through informatics.  As staff learn more about their electronic health records system their is the necessity to enter documentation accurately to ensure the reports and analysis of informatics is representative of the organization and patient care.  Systems thinking and strategic planning process should include how informatics with be utilized to assess outcomes and report strengths and weaknesses of the organization.  The systems thinking process will provide an adaptive ability to support the staff to adjust regardless of the outcome and the needed inevitable change (Roussel, 2016).

**Barriers of Strategic Planning**

Traditionally strategic planning is carried out by top management.  Top management delegation does not support the benefit of shared governance and inclusion of multisystems of the organization.  Although the best laid plans are made with the best intentions, the plan will never be successful without action.  Strategic planning must promote the execution of the plan by motivation change within the staff involved through the buy-in process.   There is risk when creating long term strategic plan, that the project may outlive the employment of those who were major stakeholders, leaders, and keeping staff accountable.  In the scenario of staff turnover during the system change it can be challenging to maintain the needed support to maintain the original plan.  In addition, the adaptive nature of systems thinking and strategic planning allow for intensive planning that includes many leaders of the organization this benefit can also be a challenge as it does not allow for fast decisions or rapid action.  When immediate, safety concerning change must be made the top down model is more effective in the short term, but may also require strategic planning to adapt and maintain the change in practice (Roussel, 2016).

**Conclusion**

 Strategic planning is part of the foundation of successful organizations. Leadership of organizations in healthcare require the ability to have critical thinking and strategic planning skills.  The systems thinking skills are used by leaders to include staff at all levels of the organization from many departments to create strategic planning that supports the system needs.  The methods are imperative to provide cost-effective, quality care for staff and patients alike. Through the organizations missions, values,0 and beliefs, nurses can share these core values to influence patient outcomes.

References

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