Ready! Fire! Aim!

The Case for Planning

General Conference of Seventh-day Adventists
Office of Global Leadership Development
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January 2010
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Five challenges in planning:

- Knowing if the plan is effective
- Enabling and empowering employees
- Being responsive to on-going change
- Connecting with constituents
- Creating a climate for new ideas
Long-range planning does not deal with future decisions. It deals with the future of present decisions.

Three key questions

1. What do we do?
2. For whom do we do it?
3. How do we excel?
Three key questions

1. What do we do?
2. For whom do we do it?
3. How do we excel?
4. How do we beat the competition?
Success in a not-for-profit organization can be difficult to assess because it is not primarily measured by the ‘bottom line’.
For every minute spent in organizing, an hour is earned.
Benefits of planning

1. Clarity regarding purpose and goals
2. Collective sense regarding the future
3. Realistic objectives in light of current capacity
4. Alignment of employee energies
5. Firm reference for decision-making
6. Efficient use of resources
7. Base from which progress can be measured
8. Mechanism for adopting change when needed
Two assumptions in planning

1. Engages widespread input
2. Looks at whole organization (purposes and structure as well as activities)
Analysis techniques

1. **SWOT** (Strengths, Weaknesses, Opportunities, Threats)
2. **PEST** (Political, Economic, Social, Technological)
3. **STEER** (Socio-cultural, Technological, Economic, Ecological, Regulatory)
4. **EPISTEL** (Environment, Political, Informatic, Social, Technological, Economic, Legal)
Planning models

1. Goals-based (most commonly used)
2. Issues-based (start with issue facing the org)
3. Organic (vision/value-based)
4. Scenario (What if...)
5. Appreciative inquiry (what works well, not what needs to be fixed)
The planning process is more important than the model that is used.
Planning models

1. Goals-based (most commonly used)
2. Issues-based (start with issue facing the org)
3. Organic (vision/value-based)
4. Scenario (What if...)
5. Appreciative inquiry (what works well, not what needs to be fixed)
6. Strategic intent (one over-arching purpose)
Strategic intent

1. Focuses attention on the essence of winning
2. Motivates by communicating value of objective
3. Room for individual and team contributions
4. Sustains enthusiasm as circumstances change
5. Uses intent consistently to guide resource allocations.
“In preparing for battle I have always found that plans are useless, but PLANNING is indispensable.”

Dwight D Eisenhower, 34th President of the USA
Scope and content of plans

1. Mission, Vision, Values
2. Organizational structure and governance
3. Environmental scan
4. Plant and facilities
5. Resource capacity
Strategic Plan Content:

- **Mission:** Fundamental reason for existence
- **Vision:** Specific, desired end result 5-10 years
- **Values:** Guidelines for behavior
- **Goals:** Areas of priority focus with success indicators
- **Objectives:** Specific initiatives and resources to accomplish goals
Strategic Plan Content:

- **Mission**: Defines fundamental purpose
- **Vision**: Defines future state
- **Values**: Defines culture and priorities
Effective vision statement

- Clarity and lack of ambiguity
- Vivid and clear picture
- Description of a bright future
- Memorable and engaging wording
- Realistic aspirations
- Alignment with values and culture
Vision statements

“The last thing IBM needs is a vision.”
Vision statements

“The last thing IBM needs is a vision.”

“Microsoft’s vision is very simple—a computer on every desk and in every home, running Microsoft software.”
Organizational structure

1. Legal status? Independent or part of a system?
2. Property—owned, leased, rented?
3. Board—size, range of expertise?
4. Board members—sufficient time and attention?
5. Board education?
6. Clarity regarding governance and management?
7. Healthy working relationship?
Environmental Factors

- Physical
- Legal
- Political
- Social
- Economic
- Technological
- Competitor
- Client
Environmental Factors

- Physical
- Legal
- Political
- Social
- Technological
- Economic
- Competitive
- Client
Environmental Factors

- Physical
- Legal
- Political
- Social
- Technological
- Economic
- Competitor
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- Technological
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- Technological
- Social
- Political
- Legal
- Physical

Factors: 8
Plant and facilities

1. Median age of buildings?
2. Property owned, leased, rented, combination?
3. Designed for the activities carried out?
4. Possibilities of re-configuration of services, expansion, relocation?
5. What adjustments needed to accommodate new lines of service, increase in clients?
Resource capacity

1. Analysis of current financial operations.
2. Service lines that increase/decrease net revenue?
3. Service lines related to mission? To community needs?
4. What is the organization’s debt capacity?
5. What are the sources for capital?
6. Validity of partnerships/collaborations?
7. Rent, lease, purchase high tech equipment?
Documenting the plan

- **Mission**: Defines fundamental purpose
- **Vision**: Defines intended future state
- **Values**: Defines culture and priorities
- **Goals**: Areas of priority focus with success indicators
- **Objectives**: Specific initiatives and resources to accomplish goals
Goal characteristics:

- Specific
- Measurable
- Acceptable to Implementers
- Realistic
- Timely
- Empowering
- Rewarding
Actions that define Strategy

Fresh action to gain market edge
New product line
New business opportunity
Defensive moves
Action to improve profits
Change in management of key functions
New partnerships
Response to changing condition
Diversification

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Planning procedures:

1. Dependent on size, complexity.
2. Requires sufficient time for engagement of stakeholders
3. Administration can delegate but not abdicate
4. Develop a sense of direction
5. Retain flexibility
6. Determine what matters most
The Healthcare Ministry’s full expression of the healing and teaching ministry of Jesus Christ will be fulfilled by becoming the leading health care organization in the broad Inland Empire region:

- Recognized regionally and globally as a premier center for whole person clinical care, teaching, and research.
- Strongly differentiated in the market through the full development of recognized clinical sites and centers of excellence.
- Preferred for an unwavering commitment to patient safety and patient-centered “high-touch” and “high-tech” service.
- Acknowledged for the professionalism, quality, compassion, and mission-orientation of its caregivers.

**SERVICE EXCELLENCE (How we deliver services)**
Transform processes, systems and environments to assure patient safety and remove barriers to patient access and throughput; promote integrated, efficient, patient care processes.

**CLINICAL LEADERSHIP (What we do)**
Building on the Institute model, fully actualize regional and global leadership in select clinical centers of excellence.

**REGIONAL OUTREACH (Who we serve)**
Strengthen and solidify presence, visibility and overall position as the leading healthcare organization in the region.

**WORLD CLASS RESOURCES (What we need)**
Develop the technologies, facilities, and people to support the teaching, research, and patient care mission.
**Motto:** To Make Man Whole

**Mission:** To continue the teaching and healing ministry of Jesus Christ

**Vision:** Transforming lives *through education, healthcare, and research*

**Shared Values:** Compassion, integrity, excellence

**World Class Distinction**

**Quality & Service Excellence**

**Teamwork & Synergy**

**Partnerships**

**Leadership & Stewardship**

LOMA LINDA UNIVERSITY
ADVENTIST HEALTH SCIENCES CENTER
Strategic Plan Rollout:

Case for change
- Fact based
- “Burning platform”
- Listener-drawn conclusion

Current situation
- Recent progress
- Celebrate successes
- Recognize mistakes

Destination
- New strategic intent
- Freedom to act
- Benefits to be experienced
Implementing the plan

- Use the planning process for ongoing education and conversation
- Understand stakeholder perspectives
- Make sure plan is specific and concrete
- Link all activities to the plan
- Become involved, but remember your role
- Use plan to hold people accountable
- Tell the whole community
- Report on measurable indicators
Plan alignment:

- Institution plans
- Entity/department plans
- Individual plans
Planning is an essential leadership task.
Leadership must articulate a sense of direction for the organization.
The core objective is to earn and maintain public trust in and commitment to your healthcare organization.
Past success guarantees nothing!
“If things seem under control...you’re just not going fast enough.”
—Mario Andretti
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Global Conference on Health and Lifestyle
Geneva, Switzerland
July 6-11, 2009
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