

Ready! Fire! Aim!

# The Case for Planning

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



Long-range planning does not deal  
with future decisions.

It deals with the future of present  
decisions.

Peter F. Drucker (1909 - 2005) U.S. management consultant  
and author.

# 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)
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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, 34<sup>th</sup> 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:



# 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?













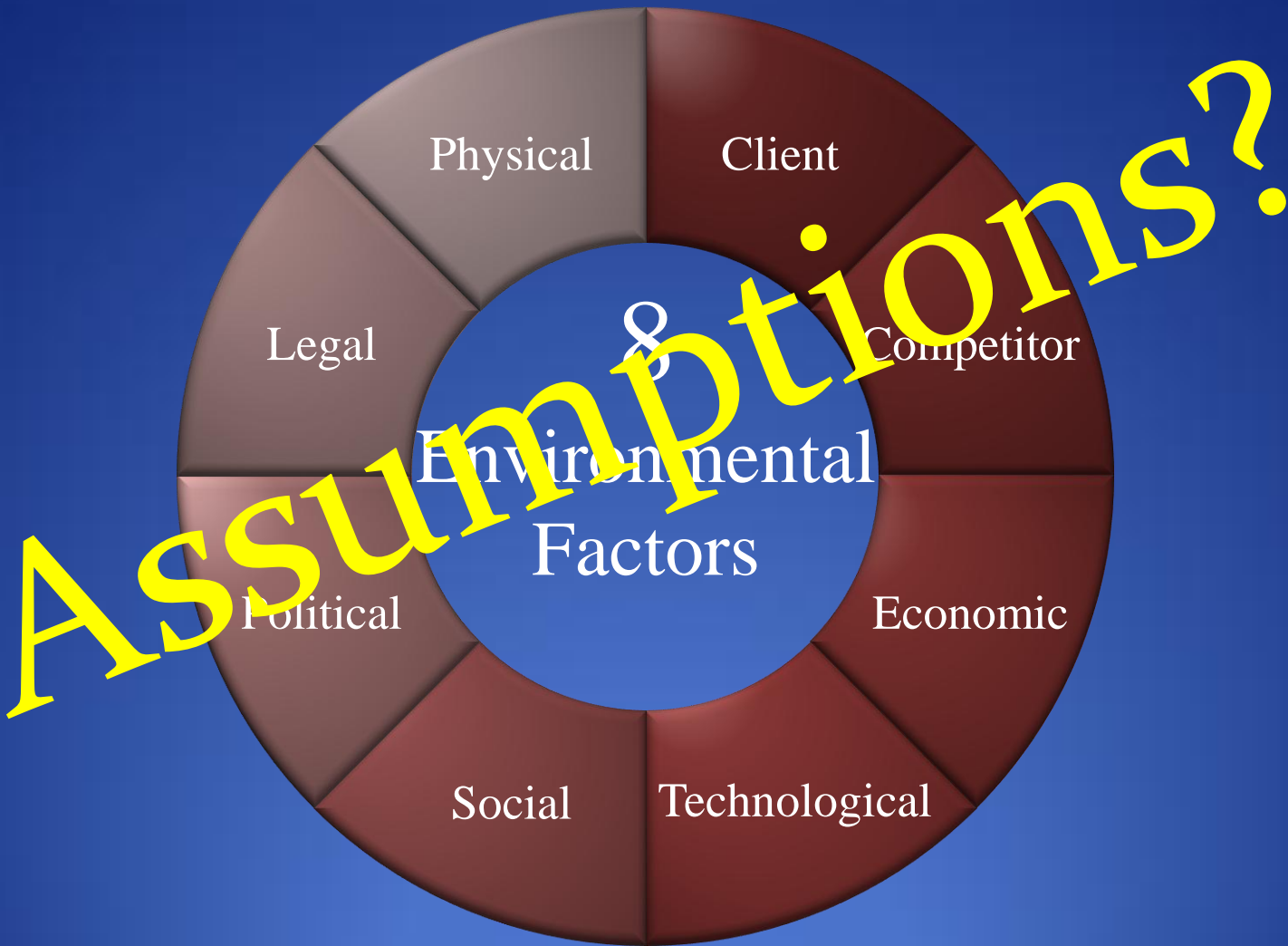












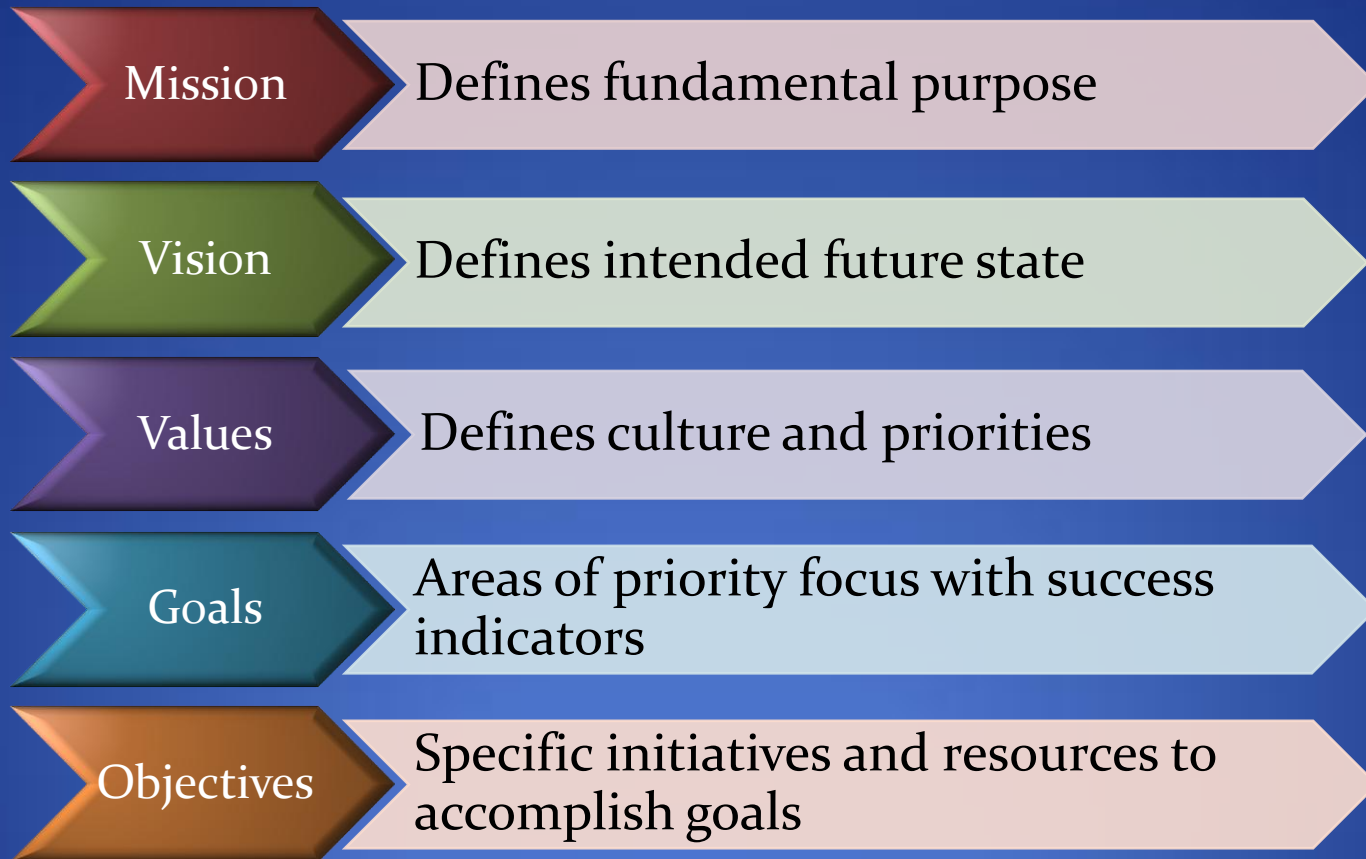
# Plant and facilities

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



# Goal characteristics:

S

- Specific

M

- Measurable

A

- Acceptable to Implementers

R

- Realistic

T

- Timely

E

- Empowering

R

- Rewarding



# 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



# Core Goals

## Future State Direction (2009)

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.

## Core Goals

### **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*

World Class  
Distinction

Quality &  
Service  
Excellence

Teamwork &  
Synergy

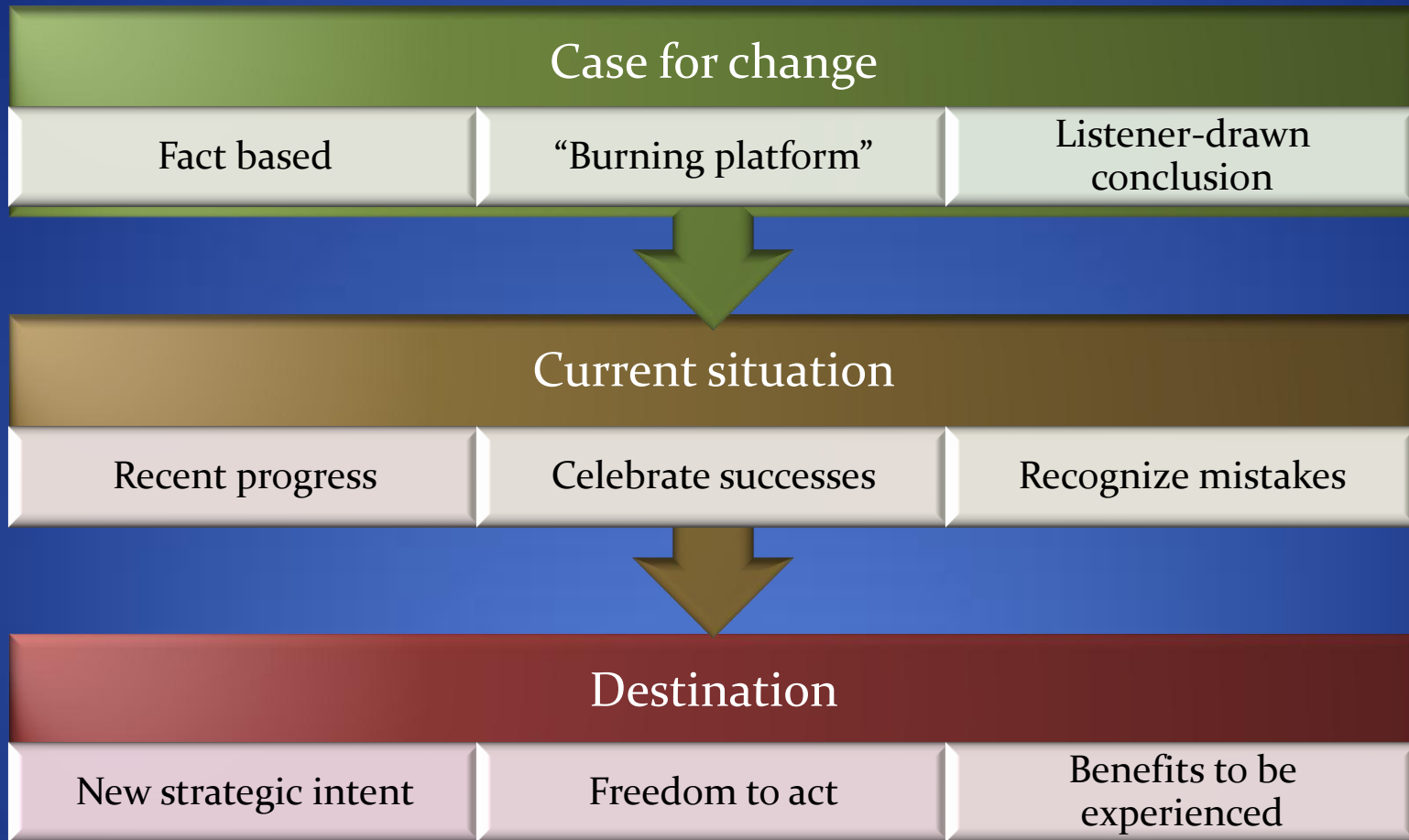
Partnerships

Leadership  
&  
Stewardship

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



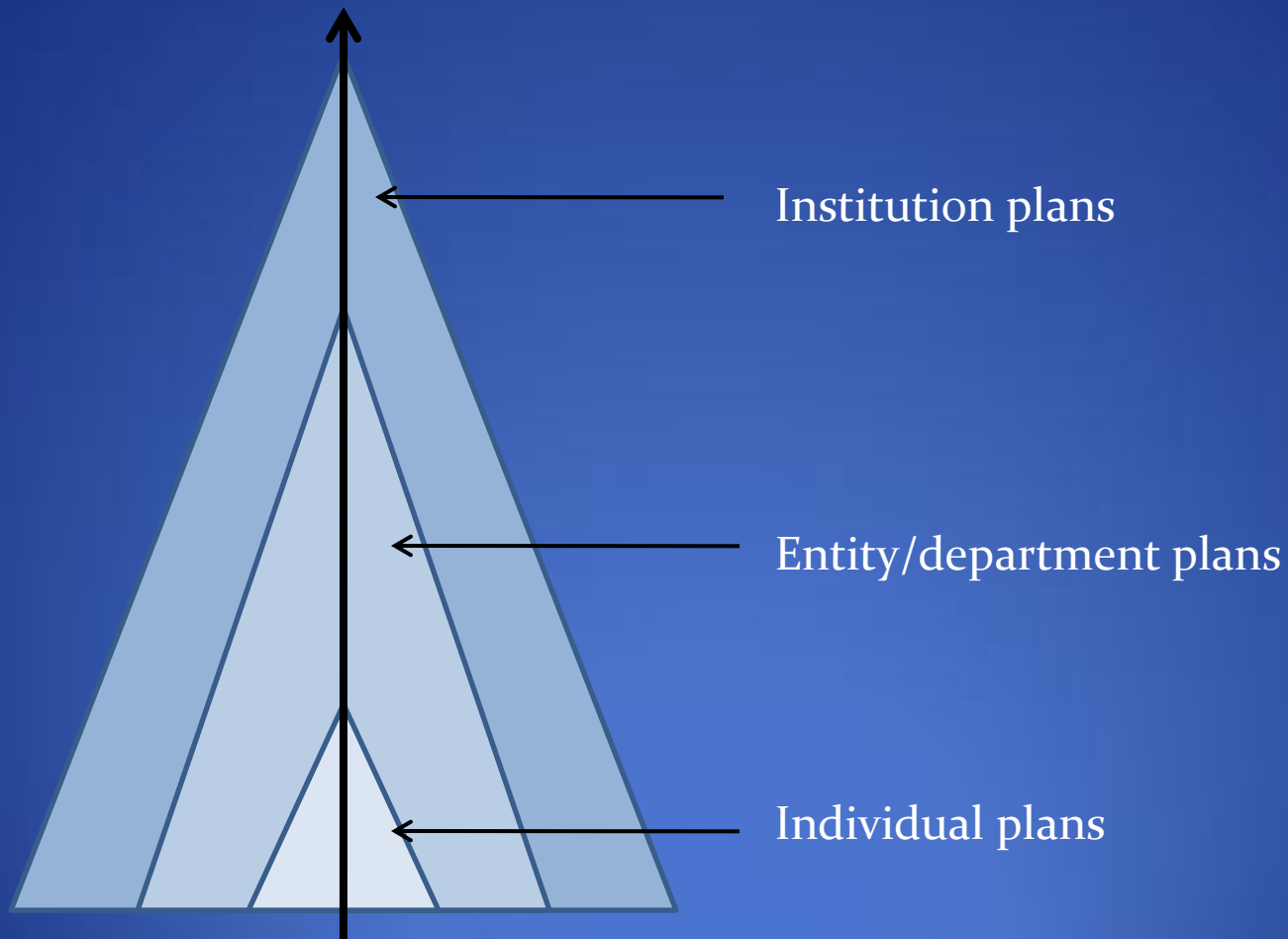
# Strategic Plan Rollout:



# 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:



A modern conference room with a large, polished wooden conference table surrounded by leather chairs. The room features a glass wall on the left, a television mounted on the wall, and a decorative plant. The ceiling has recessed lighting. A semi-transparent purple banner is overlaid on the bottom half of the image.

Planning is an essential  
leadership task.

A modern conference room with a large, polished wooden conference table surrounded by black leather chairs. The room features a glass wall on the left, a television mounted on the wall, and a decorative plant. The ceiling is recessed with multiple circular lights. A semi-transparent red banner is overlaid on the bottom half of the image, containing white text.

Leadership must articulate a sense of direction for the organization.





A modern conference room with a large, polished wooden conference table surrounded by leather chairs. The room features a glass wall on the left, a television mounted on the wall, and a decorative plant. The ceiling is recessed with multiple circular lights. The overall atmosphere is professional and sophisticated.

The core objective is to earn and maintain public trust in and commitment to your healthcare organization.

A modern conference room with a large, polished wooden conference table surrounded by leather chairs. The room features a glass wall on the left, a television mounted on the wall, and a decorative plant. The ceiling has recessed lighting. A semi-transparent purple banner is overlaid on the bottom half of the image.

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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