

Data Modernization Strategic Planning Outline

Process and Key Facilitation Points

- **Activities:** Facilitation, guidance, and tools for developing a health agency-wide Data Modernization (DM) Strategic Plan. This will include convening a DM Advisory Committee and integrating workforce and communication strategies into strategic planning with statewide and local health department stakeholders to support collaboration, transparency, and accountability.
- **Outputs:** 1) Virtual and in-person facilitated sessions that support planning, assessment, and prioritization to create components of a DM strategic plan; 2) recommended change management and communication strategies; 3) DM Committee engagement and Charter; and 4) a written DM Strategic Plan and associated implementation workplans.
- **Outcome:** Health agency engages staff and stakeholders in a meaningful DM strategic planning process to produce a relevant, measurable, and prioritized plan for the DM Committee to implement in alignment with health agency and PHIG priorities.

Coordination

Based on previous strategic planning efforts, ASTHO estimates a 6–8-month planning process moved forward through core planning team meetings alternating with DM Committee meetings with one to two focused in-person workshops to build consensus, prioritize, and develop implementation strategies.

- A core planning team will include at least 1-2 planning/facilitation leads and 2-4 health agency staff who will meet routinely (2x per month).
- The core planning team will be accountable for project management and timelines. Facilitation leads will be responsible for day-to-day project management based on the proposed activities and timeline below. This includes meeting agendas, notes, and action items for core planning team.

Assumptions

- [Good strategic planning](#) requires visioning, assessment, engagement, consensus building, prioritization, and implementation planning. DM strategic planning should align with agency-wide planning including state health assessments, improvement, operations, and strategic plans.
- Success will require a combination of non-DM-specific facilitation, planning, and prioritization tools with DM and informatics subject matter expertise such as alignment with the CDC Public Health Data Strategy, ASTP/ONC standards, PHAB Standards v2022, and other emerging DM best practices.
- The health agency, with input from the health official, will identify an executive sponsor and steering committee or committee for the planning process (and beyond).
- With support from the core planning team and facilitation leads, the DM Committee will be responsible for developing and overseeing implementation of the DM Strategic Plan. A planning process can provide the DM Committee needed direction, alignment, and commitment from cross-cutting interests.
- The health agency should lead communication with agency staff; if engaging outside facilitators, consider best approaches for when they engage groups directly as needed.
- While outside parties can support draft health agency documents, ASTHO recommends health agency staff lead the development of the final product to ensure brand and operational alignment.
- ASTHO and PHIG TA partners may be available to review and consult on draft plans and intermediate products.

Outline for a DM Planning Process

Table 1: Outline for Preparation Stage

Proposed Activities	Participants	Timeline Example	Setting Example
1. Review of current documents (e.g. PHIG workplan, Strategic Plan, ELC assessments and workplans) for alignment and in the context of existing work; prepare to share observations, opportunities	Core Planning Team	September	Virtual
2. Convene up to two DM SP planning sessions to confirm approach to DM strategic planning process (needs, content, timeline, discuss)	Core Planning Team, executive sponsor	By first week of October	Virtual
3. Kickoff : Communicate DM SP planning timeline with staff who will be engaged and more broadly (integrate change management strategies)	Executive sponsor w/ support from Core Planning Team	Early October	Multiple methods
4. Convene a DM Committee including staff from all levels and divisions; begin drafting Committee Charter	Core Planning Team	October	Virtual
5. Develop, field, and analyze environmental scan to determine key organizational needs and capacity to address those needs	Core Planning Team <i>Consult DM Committee</i>	Through November	Virtual
6. Review scan results; supplement scan with in-person session and develop or update DM mission/vision, SWOT; brainstorm initial strategies/priorities; finalize DM Committee Charter	Core Planning Team, DM Committee, senior staff and/or key DM stakeholders	December	1-2 days in person

Table 2: Outline for Planning Stage

Proposed Activities	Participants	Timeline Example	Setting Example
1. Review input from in-person and programs/units; provide feedback and recommendations for alignment with other health agency plans, federal initiatives such as the DM and PHIG, as well as best practices	Facilitator	Early January	Virtual
2. Draft structure and process for workplans and implementation strategies through coaching on performance management, monitoring, and revision	Core Planning Team <i>Consult DM Committee</i>	February	Virtual
3. Identify 3-5 strategic priorities and activities needed to address them; develop a strategic map; identify strategic priority leads	Core Planning Team, DM Committee, senior staff	Early March	1-2 days in person

Table 3: Outline for Implementation Stage

Proposed Activities	Participants	Timeline Example	Setting Example
1. Convene strategic priority leads in a series of workshops to develop detailed workplans with implementation strategies and timelines	Core Planning Team	April	Hybrid
2. Evaluate DM Strategic Plan process and any technical assistance	Core Planning Team	May	Survey
3. Evaluate and revise DM Strategic Plan and implementation plans	DM leads, DM Committee, senior staff	Ongoing	Multiple methods