

# Organizational Strategic Planning Guide

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**Report Summary:** This guide provides an overview of a seven-phase organizational strategic planning process for state, territorial, and freely associated state health agencies. It details each phase, from organizing and developing mission, vision, and values to scanning the environment, setting priorities, creating work plans, planning for evaluation, and ultimately implementing and adapting the plan. By following these phases, agencies can create or refine strategic plans that are responsive to evolving needs.

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# Introduction: Organizational Strategic Planning Guide

## Purpose of This Guide

This guide provides state, territorial, and freely associated state health agencies with an overview of the organizational strategic planning process. An organizational strategic plan includes the organization's goals, strategies, and actions needed to achieve its mission and vision and how the organization will measure success. A strategic plan provides a roadmap for how the organization uses time, money, and personnel and makes key decisions. These plans help inform actions and priorities across the entire organization for a timespan of three to five years.

This guide outlines seven phases of organizational strategic planning, which an organization should complete cyclically to allow them to adapt and refine their plans over time. This iterative approach allows organizations to remain responsive as their needs and objectives evolve. This guide also reviews keys to success and highlights tips for addressing common challenges for each phase to help organizations better navigate uncertainties, anticipate obstacles, and increase the likelihood of successful organizational strategic planning.

Health agencies can use this guide to develop new organizational strategic plans or refine existing plans. Organizations can follow the processes laid out in this guide or adjust and adapt it to meet their unique needs. After completing the planning process, agencies will be able to write an organizational strategic plan if that is the desired outcome.

This guide complements additional resources supporting other foundational planning processes within a health department such as workforce planning, data modernization planning, and quality improvement planning. Additionally, the "Resources" section at the end of this document includes links to strategic planning tools and guidance from other organizations that may further support agencies in their planning efforts.

Finally, agencies can use this guide whether they are pursuing Public Health Accreditation Board (PHAB) accreditation or reaccreditation or are not pursuing any type of accreditation. This guide supports strategic planning requirements outlined in [PHAB's Standards and Measures for Accreditation](#), which require a strategic planning process and the development of an organizational strategic plan for Initial Accreditation, Reaccreditation and Pathways Recognition. However, use of this guide does not guarantee conformity with these standards and measures. PHAB is the sole national accrediting body for governmental public health departments. Organizations are strongly encouraged to consult the Standards and Measures for the most up-to-date information regarding requirements related to strategic planning. Additionally, regardless of an organization's intent to apply for a PHAB program, the Standards and Measures can serve as best practice guidelines for planning efforts.

## Importance of Organizational Strategic Planning

An organizational strategic plan is focused and purposeful. It systematically establishes key priorities and outlines an organization's goals and how it aims to achieve them. It serves as a roadmap for how an organization uses time, money, and personnel, makes key decisions, and informs actions and priorities across the entire organization. It guides the organization toward achieving its most critical objectives while considering the broader context of its work. This approach ensures that the organizational strategic plan remains genuinely strategic.

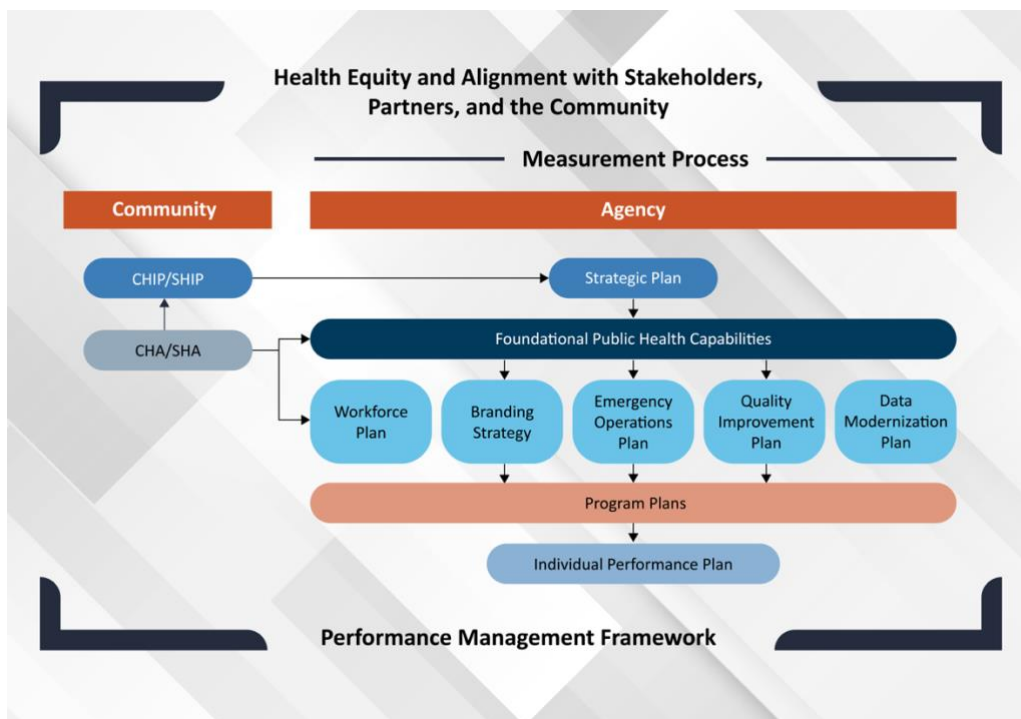
# Keys to Success

An organization may consider three keys to success during every step of the organizational strategic planning process: 1) alignment, 2) representative engagement, and 3) communication. Together, these three keys to success help enhance collaboration, clarity, and efficiency in the organizational strategic planning process and ultimately help maximize the impact of the selected strategic priorities.

## Alignment

The strategic planning committee and organizational leaders should work to align organizational strategic plans with other plans and assessments, such as the community or state health assessment (CHA/SHA), the community or state health improvement plan (CHIP/SHIP), the Quality Improvement (QI) Plan, workforce planning efforts, and data modernization planning. Health agencies can also consider ways to ensure the organizational strategic plan supports and prioritizes foundational capabilities like organizational competencies, quality and performance, equity, and communication. The figure below provides a possible model for how to align different organizational plans, measurements, capabilities and frameworks (see Figure 1 adapted from work by Marni Mason and Susan Ramsey).

**Figure 1:** Plan Alignment Model



This model demonstrates that community-owned plans, CHA/SHA and CHIP/SHIP, help to inform the internal organizational strategic plan. For example, the organizational **strategic plan** may consider what the organization may need to help accomplish the community health plans' goals.

The model further demonstrates how the organizational strategic plan, in turn, can inform an organization's **workforce plan, branding strategy, emergency operations plan, and data modernization plan**. For example, specific goals and objectives in a workforce plan may support organizational strategic priorities. Further, an organization may use its **QI plan** to guide improvements in areas where it is not meeting performance indicators.

These plans, including an organizational strategic plan, inform division and **program plans** as well as **individual performance plans**, which map out short-term goals for each team and individual to help an organization achieve its long-term objectives. Additionally, it is essential to track priorities in the organizational strategic plan intentionally. A **performance management framework** can help ensure an organization is on track to meet identified measures and expectations.

Finally, ensuring the overall plan **supports health equity and aligns with priorities of engaged individuals** and organizations, partners, and the community will ensure the organization supports broader community health needs and contributes to crucial relationship development. Given this model, an organizational strategic plan does not stand alone but is part of a comprehensive way of organizing a health agency and its partners' efforts to make sustainable public health systems change.

## Engagement

An effective organizational strategic plan, with considerations for representative engagement and health equity at its core, can assist in addressing a health organization's chief public health needs, responding to and reflecting their jurisdiction's unique priorities and needs. Considering representative engagement in organizational strategic planning can enhance innovation and decision-making by leveraging diverse perspectives, improve employee involvement by fostering a sense of belonging, enhance reputation and brand image, and demonstrate social responsibility and ethical leadership, ultimately leading to a more successful and sustainable organization.

## Communication

The strategic planning committee must ensure regular, two-way communication within and between the committee, governing entity, engaged individuals and teams, the public, and the entire organization throughout the strategic planning process. Communication aligns involved individuals and organizations, disseminates mission and vision, and allows the organization to adapt to changing environments. Regular updates, clear roles, and feedback loops enhance plan development, implementation, and evaluation. When health agencies prioritize communication, this enhances public health outcomes and better enables them to achieve their mission.

[Public Health Foundation's Planning Before You Communicate Tool](#) may help organizations consider communication opportunities and methods throughout the organizational strategic planning process.

## Prepare

Beginning a strategic planning process requires thoughtful review and preparation. Such preparation will help organizations consider desired outcomes, appropriate staff time and support, and other resource allocation. In addition to the information outlined in the first three phases below, ASTHO's Foundational Planning Readiness Assessment outlines some of these important factors.

## Phase 1: Organize

The organizing phase focuses on preparing for organizational strategic planning by deciding who will be involved, the scope of the plan, and the timeline for its development. In this phase, agencies must consider how staff are apprised of the planning process and opportunities for them to participate, as well as what those opportunities might include.

**Identify a lead or small planning team:** While completing the strategic planning process should be an organization-wide effort, the planning lead or planning team is responsible for managing the overall process. This person or team should prioritize keeping the others informed and engaged through regular communication strategies. This individual or team may be part of the organization's planning or performance improvement staff or members of leadership with strong communication, project management, and facilitation skills.

**Form a Strategic Planning Committee:** The Strategic Planning Committee (SPC) is the broader workgroup for the organizational strategic planning process. The committee should include a cross-section of individuals from leadership and non-leadership positions and various program and operational areas, including staff from client- or community-focused areas. Ensuring this diversity of experience and perspective can help the SPC consider big ideas grounded in day-to-day operations. The SPC should also consist of strategic thinkers and detail-oriented staff who can collectively think beyond their own agendas and prioritize equitable outcomes. Leadership should consider that the SPC selection process (e.g., self-selection, application, nomination, assignment) will impact the diversity of perspectives on the committee. Therefore, leaders should consider representation and group power dynamics as they form an SPC. For example, an organization may consider:

- Is the SPC inclusive (in terms of race, age, gender, disability status, focus area, geography, role, perspectives, etc.)?
- How will everyone's ideas be heard and fairly considered?
- What conditions will be created for a [psychologically safe space](#) so that all can share thoughts without fear for reprisal?

It may also be helpful to establish team agreements, roles, and responsibilities at this phase. The SPC may consider a [charter](#) that outlines these responsibilities.

**Assure Leadership Support:** The active involvement of senior health agency leadership and representatives from the governing entity is crucial in promoting buy-in throughout plan development and implementation. Leaders can ensure adequate resources are available for the planning and implementation processes, and their support signals the importance of the process to others, fostering a culture of commitment to systematic and equitable improvement. To ensure leadership support, it may be necessary to clearly articulate how the organizational strategic plan will help align the organization's mission and goals, highlighting the potential benefits and outcomes. Additionally, actively involving leaders from the outset, seeking their input, addressing concerns, and maintaining open communication channels throughout the planning process will help to secure and keep their support and engagement.

**Decide on Process Elements:** The SPC should review key process elements of organizational strategic planning including: the purpose of organizational strategic planning, the timeline, who else should be involved, the approach to use, data sources for the environmental scan, and planning trends and activities. The SPC should map the answers to the following questions:

- What activities need to happen within each step of the planning process?
- Who will do the work?
- What is the timeframe?
- How will the SPC know when they finish the planning process?
- How will the SPC document and capture pertinent information (e.g., the process followed, information needed for accreditation justification)?

The organizational strategic planning process from Phase 1: Organization to the beginning of Phase 7: Implementation and Adaptation may take from four to 10 months to accomplish, with an entire cycle following a three- to five-year timeline. Factors that may impact the timeline include the level of support for organizational strategic planning, competing priorities, existing momentum around organizational strategic planning efforts, accreditation or reaccreditation timelines, and timing around alignment with other key plans or processes (e.g., community health improvement planning, or legislative sessions).

Phase 1 is also a good time for the SPC to review previous strategic planning efforts and consider what has worked or not worked in the past.

As an example, the Guam Department of Public Health and Social Services has carried out several organizational strategic plans by hosting rigorous strategic planning events for staff, recognizing that such events provide a dedicated space for collective brainstorming, fostering collaboration, and gaining insights from diverse perspectives, which are invaluable for shaping the organization's future direction and ensuring alignment with its mission and goals.

### Keys to Success

- **Alignment:** Align with other key plans but do not duplicate. Consider including individuals who are experts or participate extensively in other organization plans as part of the SPC.
- **Engagement:** Establish a diverse SPC with varied expertise and perspectives including leadership, non-leadership, program staff, and team members that work directly with clients or community.
- **Communication:** Ensure ongoing communication and change management strategies to ensure internal buy-in. Several resources for change management exist, including the [ADKAR \(Awareness, Desire, Knowledge, Ability, Reinforcement\) model](#), [Kotter's 8-Step Change Model](#), and [ASTHO's Change Management Training Series](#).

During this phase, communications may include outlining the organizational strategic planning timeline and process and clarifying the roles and responsibilities of those involved. Organizations can leverage existing communication channels such as emails or memos, newsletters, and intranets, or hold a special kickoff meeting or town hall. Communications may be directed towards members of the SPC primarily, however, broader communication across the agency about milestones in the strategic planning process will help ensure engagement throughout the organization.

## Tips for Addressing Common Challenges

- Consider bringing in external support, which can play a pivotal role in enhancing the effectiveness and efficiency of an organizational planning process. Leveraging external expertise through facilitators, contractors, or other specialized professionals brings diverse perspectives, resources, and knowledge. These external individuals and organizations often bring fresh ideas and innovative strategies, allowing the organization to participate actively in their own process.

Organizational leaders should evaluate the cost-effectiveness of bringing in external support against the time and resources required to conduct organizational strategic planning solely with internal staff. Leaders should also consider whether the organization's strategic planning process may serve as an opportunity to build internal capacity and knowledge transfer and should assess the organization's culture and readiness for external support.

- Acknowledge potential resistance to change and proactively address concerns or objections. Leadership and the SPC should lead open dialogue, provide rationale for the strategic planning process, and emphasize participation benefits to mitigate resistance and promote buy-in.

## Phase 2: Develop Mission, Vision, and Values

The core of an organizational strategic plan lies in its mission, vision, and values. These statements succinctly capture a shared understanding of the organization's purpose, aspirations for an equitable future and the guiding principles that inform the work.

**Mission Statement:** Clearly describes the organization's purpose regarding why it exists, what it does, and whom it serves. Examples of mission statements include:

- MDDHS provides services and administers programs to improve the health, safety, and prosperity of the residents of the state of Michigan. ([Michigan Department of Health and Human Services \(MDHHS\), 2023-2027 Strategic Plan](#))
- To promote health and safety through prevention, collaboration, education, innovation, and response. ([Missouri Department of Health and Senior Services, 2023-2027 Strategic Plan](#))
- To promote healthy behaviors, prevent injury and disease, and assure the safe delivery of quality health care for all people in Pennsylvania. ([Pennsylvania Department of Health, 2020-2024 Strategic Plan](#))

**Vision Statement:** States what the organization wants to achieve, what the organization will be in the future, or what success will look like. Examples of vision statements include:

- Deliver health and opportunity to all Michiganders, reducing intergenerational poverty and promoting health equity. ([Michigan Department of Health and Human Services, 2023-2027 Strategic Plan](#))
- Optimal health and safety for all Missourians, in all communities, for life." ([Missouri Department of Health and Senior Services, 2023-2027 Strategic Plan](#))
- A healthy Pennsylvania for all. ([Pennsylvania Department of Health, 2020-2024 Strategic Plan](#))



**Values:** Define the organization by identifying the guiding principles the organization wishes to be known by.

- Human Dignity Opportunity, Perseverance, Ease. ([Michigan Department of Health and Human Services, 2023-2027 Strategic Plan](#))
- Excellence, Collaboration, Access, Integrity, Accountability ([Missouri, Department of Health and Senior Services, 2023-2027 Strategic Plan](#))
- Communication, Accountability, Teamwork and Collaboration, Competence and Effectiveness, Quality, Integrity, Respect, Reliability, and Customer Service. ([Pennsylvania Department of Health, 2020-2024 Strategic Plan](#))

**Critically Review Mission, Vision, and Values:** The SPC and organization leadership, along with other key players, should critically review the organization's mission, vision, and values to ensure they reflect its current or desired state. The organizational strategic plan sets a solid and intentional course toward achieving equitable outcomes for all populations by centering the mission, vision, and values around health equity. Questions to consider as the organization reviews its mission, vision, and values include:

- What does the organization want to be in the future?
- What does the organization do now?
- What defines the organization?
- What does the organization value?
- What does the organization want to be known for?

**Build Consensus:** The SPC can use consensus-building tools, such as [brainstorming, multi-voting, and nominal group technique, as outlined by the Office of Personnel Management](#), to confirm or refine the mission, vision, and values as key elements of the strategic plan. These statements are the organization's core, so staff and leadership from across the agency must support them. If the SPC makes any changes, they should share them widely with all organization staff and engaged individuals and organizations.

### Keys to Success

- **Alignment:** These elements are the north star of the organization's work, and all other plans should align to help the organization achieve them.
- **Engagement:** The mission, vision, and values provide an opportunity for the organization to consider how it defines diversity, equity, inclusion, accessibility, and belonging, and set out the vision for how these principles will show up in the organization's work and the community's outcomes.
- **Communication:** Communicate for ongoing buy-in and change management across the organization and beyond the SPC.

During this phase, communications may include drafts of updated mission, vision, and values for feedback or refinement to foster engagement, alignment, and consensus among engaged parties. The final versions and the process for reaching a consensus can help ensure transparency and demonstrate the importance of these organizational elements. Organizations can leverage surveys and questionnaires, online collaboration tools, email communication, or ongoing town hall meetings, among other existing communication channels

### Tips for Addressing Common Challenges

- Do not rush this process. Setting strategic priorities will be extremely difficult without a strong, shared vision for the future.
- If the SPC cannot change the previously established mission, vision, and values, it can take time to consider whether and how the organization is living them. The SPC can also adjust definitions or intentions without changing the previously established statements.
- Strive for clarity and simplicity in the mission, vision, and values to ensure they are easy to understand and memorable. Avoid jargon or overly complex language and focus on conveying the essence of the organization's purpose, aspirations, and guiding principles clearly and concisely.

## Phase 3: Scan Environment

The SPC must scan internal and external data and other inputs to consider the current and future state of the broader environment to inform strategic priorities and improve performance. The environmental scan includes two steps: gathering information and assessing information gathered.

**Gather Data:** As the SPC gathers and reviews data, they should consider looking for data points representing successes, areas of concern, comparisons between the organization's jurisdiction and others, and known disparities. Items to consider include:

- Division-level priorities, innovations, equity issues, unfunded mandates, workforce needs, and emerging issues.
- Indicators of financial health such as audit findings, spend down, risk status, and procurement accountability.
- Workforce needs such as how representative the organization's workforce is of the populations the organization serves, and results from climate, satisfaction, and competency surveys (see ASTHO's Workforce Planning Guide for more detailed workforce planning assessment strategies).
- Policy, legislation, and leadership priorities.
- Priorities outside of the organization such as those of local and tribal health departments and other partners. The SPC may consider the quality of these partnerships and cross-sector efforts that exist or could be on the horizon.
- [Foundational Public Health Services](#). The SPC may consider what the organization is succeeding at and where it could improve.
- Technological infrastructure, interoperability, and digital tools needed to support workforce development, decision-making, and service delivery.
- Engagement and communication with partner organizations and the community.

**Assess the Data:** Once the SPC gathers the information, the next step in the environmental scan process is to assess it. The SPC may analyze information collected using a [Strengths, Weaknesses, Opportunities, Threats \(SWOT\) analysis](#), [Solvability and Control matrix](#), or [Foundational Public Health Services Capacity And Cost Assessment](#). The SPC should consider the story the data tells and discuss similarities across divisions to identify overlap, opportunities for collaboration, and common themes to address in strategic planning. Finally, the SPC should determine any underlying contradictions by considering what is blocking the organization from moving toward the vision and what it can do about it.

Identifying data sources, collecting relevant information, and conducting thorough analyses should be driven by the commitment to address health equity and eliminate disparities. The emphasis is not merely on the data collection process but on using the information gained to inform equitable strategies and interventions to address the identified issues. By centering equity in the environmental scan and data analysis, public health agencies can better understand the unique needs of diverse populations and work towards equitable public health outcomes for all communities. As the SPC conducts the environmental scan, equity and power dynamics should be considered. For example, the SPC may consider the following:

- Are they using unbiased data? Was there bias in the collection of the data?
- Did some groups have more access to providing their input?
- Is the data trending to favor or disfavor certain groups?

### Keys to Success

- **Alignment:** The environmental scan provides an opportunity to review other existing plans to lay the foundation for additional future alignment.
- **Engagement:** The mission, vision, and values provide an opportunity for the organization to consider how it fosters an inclusive and accessible environment, ensures fair opportunities, and creates a sense of belonging. This process helps define the organization's commitment to serving all communities, engaging all work units across the organization, and advancing positive health outcomes throughout their jurisdiction – with an emphasis on achieving optimal health for all.
- **Communication:** Communication is key within the SPC during this phase. Any information gathered for the environmental scan should be shared widely with the SPC. This information sharing is crucial to setting the context of the health organization and helping the SPC move forward with assessing the data and eventually setting priorities.

Additionally, communication may involve sharing insights and findings from the environmental scan with engaged parties outside the SPC to help analyze findings and identify potential strengths, weaknesses, opportunities, and threats. Communication channels may include emails, presentations, collaboration tools, surveys, and feedback forms.

### Tips for Addressing Common Challenges

- Information gathering for an environmental scan can and should be a task shared by the entire SPC. No one person in the organization will have all the information needed, so it is important to rely on many people in this space.
- To help each organization division or branch get started with data collection, provide a few questions or share some existing data collection sources. For example, the Missouri Department of Health and Senior Services developed worksheets for divisions and leadership to complete and return to the SPC for review as part of their environmental scan.

- Watch out for "analysis paralysis." At some point, the SPC needs to decide that they have enough information and are ready to move on and make decisions about priorities. More information can always be gathered and shared in the future if needed.
- Asking all divisions or branches to present their data in a similar way (e.g., PowerPoint slide) may help ensure that the information can be easily combined into a single resource. Also, putting some length parameters on it (e.g., each division or branch can share up to three slides) may ensure that the highest priority information is shared and help make analysis smoother and more efficient.

## Plan

The second category in the strategic planning process is "Plan." In this category, the organization will develop the strategic plan document and associated work plans for implementation throughout the next three to five years. It is critical for the SPC to strategically outline the organization's priorities and ensure each division or branch can develop and align its work to those priorities.

### Phase 4: Set Priorities

Set forward-thinking priorities, while also leveraging current opportunities. These priorities may emerge from themes in the previous environmental scan phase, such as workforce development, policies and procedures, and resource management. Strategic priorities should also align with other plans, especially the CHA/SHA and CHIP/SHIP, but ideally, they should not duplicate them. Finally, strong strategic priorities will have support from key staff, leadership, and the governing entity.

**Reflect on Mission and Vision:** To develop priorities, consider the organization's mission and vision and the environmental scan results or SWOT analysis. The SPC should work to answer the question, "How does the organization carry out the mission over the next three to five years?" Through structured exercises, including [brainstorming sessions](#) and [consensus-building workshops](#), the SPC should work to generate and evaluate ideas, eventually [clustering them](#) into clear and important priorities. The SPC should clarify these priorities and name them based on group discussion.

**Consider the Desired State:** Once the SPC has established priorities, it should consider the desired end state for each priority area, enabling it to "plan backward" and develop objectives to achieve these goals. The SPC should identify milestones to chart the path toward these envisioned accomplishments. The SPC can accomplish this by convening key players and breaking them into small groups to develop and discuss these objectives.

**Take a Reality Check:** The SPC may also want to conduct a "reality check" of the priorities and objectives so far. Are the objectives achievable? Do they reflect the organization and community's environment and needs?

**Consider Resources:** Assess resource constraints, such as time, staffing, and budget.

**Narrow the Focus:** Finally, the SPC can prioritize objectives through a voting process, focusing planning efforts on the most pressing needs. Narrowing the focus can help to make substantial progress in implementation to build positive momentum and a sense of accomplishment. The SPC should acknowledge that this organizational strategic plan is a living document and can be adapted and broken down into manageable objectives and activities.

## Example Process: Developing a Strategic Map

There are many strategies and formats for developing strategic priorities. Options to consider may include the [Technology of Participation strategic planning process](#) by the Institute of Cultural Affairs, the [VMOSA \(Vision, Mission, Objectives, Strategies, and Action Plans\)](#) by the Community Toolbox, or the strategic mapping process developed by TSI Consulting Partners, Inc.. An example of this process is outlined below.

A strategic map is an at-a-glance visual of some of the core elements of the organizational strategic plan. As a process, strategic mapping is an organized, stepwise approach to developing and uncovering these key elements.

1. **Identify the Central Challenge or Central Focus:** Identify the organization's central challenge—the focal point of the strategy. The central challenge briefly defines what the health organization must do to support its mission, vision, and values. If the organization could not change its mission, vision, and values in a previous step, the central challenge might be a more flexible point for the SPC to consider what the organization does and how it operates. The central challenge may be another opportunity to consider how the organizational strategic plan can align with the CHA/SHA and CHIP/SHIP and what the organization needs to do to support accomplishing the health improvement plan goals. The focus should also be on a forward-thinking challenge the organization can do something about.
2. **Identify Strategic Priorities:** The strategic priorities are the few critical things the organization must do to meet the central challenge. They focus on the most vital, highest-value opportunities. The priorities should still be broad, focusing on what the organization needs to do, not yet on how the organization will get there. While many priorities may emerge during this process, it will be necessary to strategically narrow the list to a manageable number that represents the capacity and resources available to accomplish them. When selecting strategic priorities, the organization may consider what it has the capacity to undertake (e.g., financial and human resources), what the data is telling them, what external forces are in play that might threaten or present an opportunity, and how the organization is considering [health equity](#) and [power](#) in the process. As the SPC develops strategic priorities, it may be important to use specific prioritization techniques to narrow the list further. Prioritization techniques to consider may include the [multi-voting technique](#), [priority setting matrix](#), or [nominal group techniques](#), among others.

At the end of the process, there are two tests of a strategic priority:

- Is each priority necessary to meet the central challenge?
- Are the strategic priorities, taken together, sufficient to meet the central challenge?

If the priorities pass these two tests, the SPC should consider including them in the strategic map.

A health agency may also identify cross-cutting priorities, which are core to the central challenge and embedded in efforts to implement strategic priorities. They are the priorities that touch all the other priorities. These cross-cutting priorities may reveal themselves as the SPC begins to work on objectives and notice common themes or elements across the strategic priorities. Examples of such priorities may be a focus on communication, health equity, focus on the workforce, etc.

3. **Identify Strategic Objectives:** Strategic objectives are more specific in defining what the strategic priority means. However, they are still at the "what" level of strategy, not the "how" level of implementation. At this stage, consider developing [SMART](#) or [SMARTIE](#) objectives. Establishing short to intermediate outcome statements that are clear, measurable, and specifically tied to the priority may make it easier to develop work plans in future steps.

4. **Identify Implementation Sequencing:** A health agency cannot address all objectives simultaneously. The SPC will need to organize and prioritize objectives to implement in Year 1. The SPC may use similar prioritization techniques here as they did when identifying strategic priorities. This step will help determine what comes first, second, third, and so on.
5. **Gain Consensus:** When the SPC completes the strategic map, they will want to ensure they have broad buy-in before finalizing it. The team (both the SPC and the broader organization) must identify their work in at least one area of the strategic map. It is vital to ensure that leadership and the SPC can tell the story of the strategic map and help engaged individuals and teams see themselves in it. In addition to introducing the strategic map to teams across the organization, it is essential for the SPC to listen and invite feedback on the map. Following common change management principles are important for building support and communicating the SPC's work.

As an example, the [Missouri Department of Health and Senior Services](#) developed a strategic map as part of its strategic planning process. The department leveraged this concise representation as a way to communicate the strategic plan both internally and externally.

### Keys to Success

- **Alignment:** The priorities and objectives identified in other key plans should inform the strategic priorities for the organizational strategic plan. The strategic priorities should work in concert with other plan priorities and objectives to help achieve the mission and vision and support the community's overall health. The SPC should ensure that priorities align with health assessments without duplication. For example, the SPC may consider what internal strategies the organization can implement to support the priorities identified in the CHA/SHA and CHIP/SHIP.
- **Engagement:** Consider who engages in developing the priorities and what factors the SPC considers in identifying a priority. The SPC should also consider the data sources, definitions of data, expressed needs and gaps that they select to use in developing the strategic priorities, and why these were chosen over other sources and information.
- **Communication:** Share the strategic priorities with engaged individuals and organizations. Communication may involve sharing the criteria for prioritizing strategic initiatives or goals and the rationale behind the decision-making process. Communication channels may include meetings, presentations, emails, intranets, and other existing channels. Gaining buy-in and support at this phase will help ensure the plan has the right people and resources to implement the agency's priorities.

### Tips for Addressing Common Challenges

- During this step, if the organization hasn't already established a glossary of standard terms, it may also be important to develop a common language framework for the organizational strategic planning process, defining terms such as "priority area," "goal," "objective," and "strategy" (or other similarly used organizational terms) to ensure clarity and agreement across the organization. This consistency fosters clear communication, minimizes confusion, and enhances collaboration among engaged members, facilitating effective planning and implementation processes.

- Remember to be strategic and forward thinking when identifying priorities. Strategy requires agencies to prioritize among current processes and initiatives, recognizing that not all of them should be completed simultaneously at the same pace. Although the organization will continue existing programs and initiatives, this is the time to make thoughtful decisions about future priorities while considering capacity. Consider the organization's mission, vision, values, and environmental scan data. The SPC should ask, "How will the organization fulfill the mission in three to five years?"
- It may also be important to bring other team members into the planning process after the SPC identifies the priorities but before objectives are determined. These additional team members should be subject matter experts in the priority areas who can help develop the objectives. Ultimately, given their expertise, they will also be instrumental in implementing the plan.
- While later phases in the organizational strategic planning process will focus more extensively on evaluation planning, the evaluation planning process really starts when priorities, goals, and objectives are developed. The metrics or key performance indicators for these elements will help drive future evaluation, so focus on outcomes and products. Set three- to five-year milestones and activities for each priority.
- Make intentional choices on resource use, where the organization will focus its energies, and how it will set overall priorities.

## Phase 5: Develop a Work Plan

After defining strategic priorities and objectives, the SPC and subject matter experts should develop specific tasks for each objective. They can form action teams to address each strategic objective. These action teams should include subject matter experts and the people who will be responsible for doing the work. Their knowledge and input at this phase will prevent the organization from having to redo this work at a later stage.

The action teams should outline activities, required resources, responsible parties, and deadlines for their assigned objective, which they should then add to a document everyone can see. The SPC and subject experts will review and adjust the document based on the timeline, resources, and responsibilities. This agreed-upon document becomes the work plan.

**Align With Strategic Priorities and Objectives:** Work plans should align with the broader strategic priorities and objectives. Consider the steps the organization must take to accomplish the objectives while considering the vision and mission.

**Clarify and Provide Detail:** Ensure that work plans are explicit and detailed, without ambiguity about tasks, timelines, responsibilities, and required resources. Clear communication is critical. The work plan will help determine specific actions to help make the organizational strategic plan a reality.

**Assign Accountability and Leads:** Assign clear accountability and leads for each task or activity. Knowing who is responsible ensures people will track progress and better follow through on activities.

**Integrate and Collaborate:** Work together across different parts of the organization where necessary. Work plans often involve multiple engaged individuals and teams; fostering collaboration enhances efficiency. If cross-departmental teams work on shared activities, they should also be included in developing and approving them.



**Consider Resource Allocation:** Assess and allocate resources realistically. Recognize the organization’s time, budget and staffing constraints and plan accordingly to avoid overburdening teams. An organizational strategic plan must be designed to recognize that an organization cannot complete everything simultaneously. It is also important to keep this same idea in mind with the work plan. Considering time, money, and personnel, prioritize and sequence based on need and what the organization can do first, second, third, etc. If necessary, revisit the priorities identified and agree to focus on two or three at the start of the timeline before turning to others.

Multiple strategies, formats, and resources exist for developing work plans. Options to consider may include the [Technology of Participation action planning process](#) by the Institute of Cultural Affairs, action planning and implementation planning resources from [NACCHO's MAPP 2.0](#), resources from the [Community Toolbox for Developing an Action Plan](#) by the University of Kansas, or more holistic process visuals such as [logic models](#).

Find examples of organizational strategic plans in practice in the [United States Virgin Islands Department of Health Strategic Plan 2020-2025](#) and the [Connecticut Department of Public Health Strategic Plan 2023-2025](#).

### Keys to Success

- **Alignment:** Integrate the organizational work plan into specific program work plans and individual employee performance plans. Consider how these activities will inform additional plans in the organization.
- **Engagement:** Evaluate and consider the planned involvement of individuals and teams in the implementation process, paying particular attention to health equity. Who is involved in the planning and implementation process? How are resources for implementation distributed? Take time to consider if planned activities may inadvertently exacerbate disparities. If so, how can they be modified or replaced to positively contribute to health equity goals.
- **Communication:** When sharing with all members of the planning process, acknowledge the time and collaboration that went into producing this detailed plan of action. Such acknowledgment demonstrates a commitment to openness, agreement, recognition, and involvement, essential for successful strategic planning and implementation. Communication channels may include division meetings, intranets, emails/newsletters, and other existing channels.

### Tips for Addressing Common Challenges

- Remember, an organizational strategic plan and a strategic work plan should be strategic, prioritized, and sequenced. As agencies progress on initial priorities, they can move on to secondary and tertiary priorities.
- Build flexibility into the work plan to accommodate unforeseen changes, challenges, or opportunities during implementation.

## Implement

The final category in the strategic planning process is “Implement.” In this category, the organization has completed both the strategic plan and work plan. Now, teams and leaders will focus on implementing the work plan. Before doing so, they must consider a plan for evaluation and monitoring that can be implemented alongside the work plan to ensure they meet the SMART or SMARTIE objectives in the strategic plan.



## Phase 6: Plan for Evaluation and Monitoring

Evaluation methods help measure the effectiveness of programs and activities. A performance management system with goals and benchmarks to track plan implementation can provide quick, visual oversight into ongoing evaluation efforts by fostering a culture where the organizational strategic plan becomes integral to daily operations and decision-making. While evaluation and monitoring will occur throughout the implementation of the organizational strategic plan, planning and preparing for evaluation should not be an afterthought.

**Implement Data Collection Mechanisms:** Set up systems and processes to collect relevant data regularly. These systems may involve automated data collection tools, surveys, periodic reviews, or ongoing tracking of specific metrics.

**Communicate for Transparency:** Plan for and engage in discussions and transparent data reporting to focus collective efforts and inspire involvement across staff and organization divisions.

**Embed Evaluation into Plan Implementation:** Brainstorm each priority's potential metrics and data sources, establishing goals and indicators of problems for each measure. Through this process, outline details regarding data sources, responsible parties for tracking metrics, frequency of tracking, and review intervals for progress evaluation. This information was likely solidified while priorities, goals, and objectives were set. However, this is an opportunity to review it and ensure it is part of a systematic evaluation and monitoring process.

The organization can leverage a performance management system to track and assess selected indicators against predetermined goals, objectives, and metrics. The organization should actively evaluate progress to ensure accomplishment of goals or realignment of strategies and activities as needed.

### Types of Evaluation Strategies

Process Evaluation monitors the step-by-step implementation of processes, assessing the quality, accuracy, and reach of the work. Process evaluations allow the organization to see how it achieved an outcome or impact. An organization can use process evaluations to measure quality improvements by measuring service reach, fidelity, and customer satisfaction. Process evaluation determines whether the organization has implemented activities as intended.

#### Examples of Process Evaluation Measures:

- Percentage of staff positions with an updated job description.
- Number of partnerships established.
- Number of newsletters distributed.

Outcome Evaluation measures the tangible impact and changes resulting from activities. It focuses on difficult but important questions regarding the difference in the work made.

#### Examples of Outcome Evaluation Measures:

- Percent decrease in vacant positions.
- Percent increase in public health funding.
- Percent increase in population with access to broadband.

## Keys to Success

- **Alignment:** A performance management system will help the organization track and evaluate the specific indicators chosen to measure. This system or process may include establishing performance standards, measuring performance, implementing quality improvement practices, and reporting on progress. Leverage this system or method to support the strategic plan and other organizational plans and priorities and continue demonstrating value in the work. Learn more about performance management systems and processes in the [Public Health Foundation's Performance Management Toolkit](#).
- **Engagement:** Consider the metrics for evaluation and methods identified. Whose data is being used? Whose data is left out? Who has shared their data and how? How is the evaluation data framed? How do the data, strategic plan, and work plan portray the organization's programs, populations, and people? Consider equity in how the organization defines "success" and "progress."
- **Communication:** Ongoing communication about the evaluation plan and, eventually, evaluation results will help ensure continuous buy-in and implementation of the strategic priorities. Share the plan and results with all engaged individuals and organizations. Communication channels may include regular meetings, intranets, newsletters, dashboards, or other existing channels.

## Tips for Addressing Common Challenges

- Evaluation should not be an afterthought of the planning process. Early planning is critical to dedicate resources, staff time, and expertise to this crucial step.
- Be very thoughtful about the evaluation indicators that are selected. The evaluation is only as good as the indicators. As an example, the Colorado Department of Health and Environment developed a [resource to help their teams establish strong performance measures](#) to evaluate and monitor their work. Consider whether the indicators reflect progress toward the strategies, objectives, and priorities and how the organization will use them to tell the story of its success.

## Phase 7: Implement the Plan, Review, and Adapt

Ensure that the organization implements the plan, both dynamically and responsively. Strategic planning efforts should allow for ongoing evaluation, adaptation, and agreement with organizational goals and environmental changes.

**Operationalize the Plan:** Program plans and individual performance goals should clearly connect with the organizational strategic plan. These more detailed plans, with shorter timelines, continue to help implement the organizational strategic plan.

**Lean on Identified Leads and Plan for Periodic Reviews:** During the development of the work plan, the team identified lead individuals or divisions for each strategy. These people will lead the implementation and monitoring of those strategies. Plan regular check-ins and updates of progress and performance measures at least once per year; however, more frequently may be necessary.

**Leverage Quality Improvement Practices:** Use performance management and evaluation data to identify improvement opportunities and refine processes to align with strategic goals. Continuously monitor progress, review data, and adapt to environmental changes.

**Consider the Plan a Living Document:** Treat the organizational strategic plan as a living document that changes over time and is subject to ongoing review, adaptation, and updates based on changing circumstances. Encourage ongoing involvement with key personnel, like the SPC, for periodic review and adjustment of the plan. Use information from the implementation process to inform future planning efforts.

### Keys to Success

- **Alignment:** As the organization updates the plan and prepares for future iterations, consider how the strategic plan connects to other organizational plans and organizational capacity to determine future sequencing and timelines for planning processes.
- **Engagement:** Consider who is tasked with completing various strategies and how each strategy is resourced. Also, consider who is represented, considered, consulted, engaged, and partnered with when implementing and revising the strategic plan.
- **Communication:** Regularly share progress toward implementing the organizational strategic plan with engaged individuals and organizations, including the governing entity, leadership, and frontline staff. Regular communication fosters increased awareness of priorities and objectives and allows dialogue on whether they're realistic and effective as the organization implements the plan. Communication channels may include town halls, newsletters, intranets, and other existing channels.

### Tips for Addressing Common Challenges

- Organizational strategic planning processes continue even after the strategic plan is written. Consider maintaining the SPC throughout the strategic plan implementation phase. A dedicated committee will support advocacy for the implementation efforts, including appropriating resources and creating strategic plan champions within the organization.
- Throughout the strategic planning cycle, build and maintain relationships with individuals and organizations, both internal and external to the organization.
- Communicate and regularly share information on the various stages of progress, implementation, impacts, barriers, and changes to the plan.
- Encourage a culture of continuous learning, innovation, and improvement within the organization. Create opportunities for employees to share feedback, insights, and lessons learned from implementation efforts. The organization can use this information to make immediate changes and inform future planning efforts.

For example, through the Guam Department of Public Health and Social Service's ongoing strategic planning efforts and feedback loops, they now have baseline data and a well-established methodology that can be used for future organizational strategic planning, providing a solid foundation for informed decision-making, continuous improvement, and adaptation to emerging challenges and opportunities.

# Conclusion

The organizational strategic planning cycle consists of seven phases across three categories: organize, develop mission and vision, scan environment, set priorities, develop a work plan, plan for evaluation and monitoring, and implement the plan, review and adapt. In order to successfully develop and implement a strategic plan, it's critical for agency staff and leaders to consider the plan's alignment with other organization plans and priorities, ensure careful consideration of participants in the planning process, and communicate with openness throughout the entire process. If developed strategically, the organization can create and achieve its public health goals. Just remember: Prepare, Plan, Implement!

## Resources

### Phase 1: Organize

- [Public Health Foundation: Planning Before You Communicate](#)
- [Center For Creative Leadership: How Leaders Can Build Psychological Safety at Work](#)
- [ASTHO: Project Team Charter](#)
- [The Prosci ADKAR Model](#)
- [Kotter: The 8 Steps for Leading Change](#)
- [ASTHO: Change Management eLearning Series](#)

### Phase 2: Develop Mission, Vision, and Values

- [Office of Personnel Management: Methods that help teams reach consensus](#)

### Phase 3: Scan Environment

- [Foundational Public Health Services](#)
- [Community Toolbox: SWOT Analysis](#)
- [Public Health Foundation: Solvability and Control Matrix](#)
- [PHAB: Foundational Public Health Services Capacity and Cost Assessment](#)

## Phase 4: Set Priorities

- [Minnesota Department of Health: Brainstorming](#)
- [ToP Network: Facilitate Consensus Workshop](#)
- [Minnesota Department of Health: Affinity diagram](#)
- [ToP Network: ToP Strategic Planning](#)
- [Community Toolbox: An Overview of Strategic Planning or Vision, Mission, Objectives, Strategies, and Action Plans \(VMOSA\)](#)
- [ASTHO: Operationalizing Equity](#)
- [We All Count: Introduction to the Funding Web](#)
- [University of Kentucky: Multivoting](#)
- [Public Health Foundation: Priority Setting Matrix](#)
- [American Society for Quality: What is Nominal Group Technique?](#)
- [Oregon Health and Science University: Establishing Your SMART Objectives](#)
- [University of Minnesota: Writing SMARTIE Goals](#)

## Phase 5: Develop a Work Plan

- [ToP Network: Create Plans Collaboratively](#)
- [NACCHO: Mobilizing for Action through Planning and Partnerships \(MAPP\)](#)
- [Community Toolbox: Developing Action Plans](#)
- [University of Wisconsin: Enhancing Program Performance with Logic Models](#)

## Phase 6: Plan for Evaluation and Monitoring

- [Public Health Foundation: Performance Management Toolkit](#)
- [Colorado Department of Public Health and Environment: How to Create Performance Measures](#)

## Additional

- [Strategic Planning Resources from NACCHO](#)
- Developing a Tribal Public Health Department Strategic Plan: A How-To Guide from [Redstar Innovations and NACCHO](#) and [Seven Directions](#)
- [Developing a Strategic Plan and Organizational Structure from The Community Toolbox](#)
- [Strategic Planning in the Public Health Sector Handbook from Kansas Health Institute](#)
- [Strategic Plan Template and User Guide from PHAB's Center for Innovation](#)
- [Strategic Planning Trainings from Public Health Learning Navigator](#)
- [Strategic Planning Series from Region V Public Health Training Center](#)
- [Strategic Planning Courses from TRAIN](#)
- [Engaging Partners in a Virtual Space](#)