



**Strengthening Oklahoma's Safety Net,  
One Community At A Time**

## **Board Bulletin**

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### **Strategic Planning: The Roadmap to CHC Success**

The center's board operates in an economic, social, and political environment. Through planning, the board can give the center the means to establish and sustain its mission, determine policies and procedures, highlight the need for -- and ways to obtain -- funding, market the center's services, deal with changes in leadership, and make timely responses to legal and political mandates. Health center boards need to engage in both long-term (strategic) planning and short-term planning. The strategic plan is a dynamic process, one that continually guides the board and center management. Planning is a 'change agent' when change is merited. It is a process whereby you determine direction and then develop a roadmap that will take you there. Planning is hard work but provides valuable feedback as to employee performance/satisfaction and productivity of current activities. It is a valid management function and a responsibility of the CHC board that must have the commitment from the board, the center's CEO, and the staff to be successful.

#### ***The Planning Process***

The strategic planning process consists of six, sequential stages:

- **Stage 1: Mission Formulation** - developing the mission statement is critical because it will chart the center's future direction and establish the basis for decision-making
- **Stage 2: Organizational Assessment** - you must know the critical issues (a difficulty that has significant influence on the way the center functions or its ability to achieve its goals) and must be able to identify and rank the center's strengths, weaknesses, opportunities and threats
- **Stage 3: Developing Objectives** - examine capacity and what is expected from its users of services
- **Stage 4: Developing Action Plans** - identify the ways in which each objective might be met, including cost analysis and strategies that will most likely achieve the objective
- **Stage 5: Implementation** - the staff should be able to use the plan in everyday decision-making
- **Stage 6: Evaluation** - serves to identify successful strategies, as well as strategies that may need to be modified to ensure that all objectives are met

Short-term planning usually occurs on an annual basis and is derived from the 3- to 5-year strategic plan. Planning helps build consensus but be aware that not everyone involved in planning will agree on what should be done. The challenge is not to get bogged down with the planning process but to stay focused on the purpose of planning. To keep things moving forward and to come to closure when there isn't unanimous agreement, you may want to utilize the services of a trained facilitator who will help move the planning process along. Both strategic and short-term plans are meant to serve as a framework for action in creating the health center's future direction.

If you have questions or want further information, please contact OPCA by phone or e-mail [jgrant@okpca.org](mailto:jgrant@okpca.org). The questions below are provided to help you with development of sound planning practices.

\_\_\_\_\_ Does your center have a strategic plan? Is it being implemented and evaluated?

\_\_\_\_\_ Does your mission statement define the purpose of the center? Does it express the values of the organization -- its 'philosophy of doing business'?

\_\_\_\_\_ Does your board, with the management team and staff, engage in short-term planning annually?

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