

## **Strategic Plan Review**

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The goals, mission, vision, and values are the backbone of any organization. According to Cady et al. (2011), many companies miss the mark when it comes to their organizational statements, confusing the overarching goal. When an organization lacks a cohesive and straightforward identity so do its teams. Precision and clarity are of the utmost importance in crafting these statements to ensure they translate well to teams and resonate with every individual in the organization. Creating organizational statements requires a process called strategic planning which is identified by Roussel et al. (2023) as a “systematic process through which an organization agrees on – and builds commitment among key stakeholders to set priorities that are essential to its mission and are responsive to the environment”. This paper aims to explore strategic planning by reviewing existing literature through an annotated bibliography, an analysis of a case study, and a reflection of the proposed questions in the application section.

## **Annotated Bibliography**

Drenkard, K. (2012). Strategy as solution: Developing a nursing strategic plan. *Journal of Nursing Administration*, 42(5). 242-243.

<http://www.doi.org/10.1097/NNA.0b013e318252efef>

Denkard (2012) referred to a strategic plan as a map used to guide “members of an organization to envision its future and develop the necessary procedures and operations to achieve that future”. The article walked through the components of strategic planning rather informally. The article explained that the process involves understanding the current state of the organization, developing a shared vision, conducting a gap analysis, developing an action plan, involving key stakeholders, focusing not only on the immediate issues, but also long-term issues, and then creating a formal plan for

measuring outcomes. The author drove home the message by stating that strategic planning provides an opportunity for nurses to be proactive rather than reactive, which improves patient experience and outcomes. Though relevant and accurate, this article lacks the depth of a quality article as it uses a reference to an article written by the same author.

Kurec, A. (2014). Strategic planning without strategic thinking will fail. *Clinical Leadership & Management Review*, 28(1), 16-21.

Strategic planning is the process of bringing an organization's mission and vision to fruition through a framework and action steps. This can be done through issue-based planning which is developing a plan for one issue that has a lot of moving parts or through vision-based planning which involves starting with deciding on the solution and working your way backward to resolve the issue. Kurec (2014) explained that a strategic plan has six steps: set goals, set a timeline, decide who should make the plan, identify tasks, develop the strategic plan, and complete the process. When setting a timeline, it is important to consider the potential environmental changes as the plan moves through time; five years or less is ideal. In deciding who should make the plan, both divergent and convergent thinkers should have a seat at the table, allowing for both intellectual and imaginative conversation. Writing specific, measurable, attainable, relevant, and timebound (SMART) goals will ensure the goals of the plan have all the necessary components to set the team up for success. To develop the plan, the team should first create the ideas, then use data to confirm the validity, and finally combine all of the work up to this point into a feasible and digestible solution. The last step involves writing up the full plan which should include who will be completing which tasks, necessary

resources, and a date of completion all while considering the mission, money available, stakeholder input, and the overall management of the plan. Because of the challenges associated with strategic planning such as being time-consuming, costly, and overwhelming, many tend to shy away from it. The article is a relevant, accurate, and quality article that emphasizes that strategic planning requires motivation and commitment but is a worthwhile investment.

Pulaski, G. (2013). Achieving regulatory goals through strategic planning. *Journal of Nursing Regulation, 4*(2), 49-54.

Following the implementation of the Affordable Care Act, recognition of a fractured healthcare system, and a call to action for reform made by Berwick (Roussel et al., 2023), healthcare organizations were not the only entities scrambling to align new strategic plans. State boards of nursing (BONs) were facing the same difficult, multidimensional problems as public and private organizations. This article presents the steps BONs need to take in developing new strategic plans for the enforcement of the Nurse Practice Act laws and policies and procedures for overseeing education programs, facilitating disciplinary processes, licensing individuals, and monitoring the legislation process and schedule. The time frame for a strategic plan to be fully implemented is typically three years with a 1-year action plan and review to make sure the action plan stays on track.

Regulators, much like administrators, need to employ a successful strategic management process to maintain the health, safety, and protection of the public. By executing the four major components of strategic management: strategic learning, strategic thinking, strategic planning, and strategic action, BONs regulators were able to develop a plan that helps achieve the common vision of the BONs, legislators, educators,

practitioners, students, professional associations, and healthcare organizations. Clearly defining the vision, mission, and values will enhance the strategic planning process. Collaborative partnerships among internal and external stakeholders will further strengthen efforts. Implementation follows the development of the plan. Once the plan is implemented, analysis and evaluation steps take place. Pulaski (2013) points out that strategic planning is a cyclical process that continues to build on past experiences, current conditions, and future opportunities. With multiple responsibilities in their charge, BONs heavily rely on productive strategic planning to ensure the success of all those they regulate.

Zuckerman, A. M. (2014). Successful strategic planning for a reformed delivery system. *Journal of Healthcare Management*, 59(3), 168-172.

Is strategic planning beneficial in the uncertain climate that healthcare entities currently find themselves? Is it worth developing a three to five-year plan when the course of reform is turbulent and sometimes unpredictable? According to Zuckerman's article, planning is not only necessary but also essential to sustainability. Strategic planning is even more critical in times of uncertainty for several reasons. In times of limited resources, effective short and long-term plans are necessary to provide appropriate allocation. Larger organizations and those with a larger footprint benefit from the alignment of their entities to improve efficiencies and offerings. At times of uncertainty, adaptability, clear direction, and strategy are attributes that set successful organizations apart from those that fail.

Strategic planning has been shifting and pivoting to meet the needs of more contemporary organizations. In response to the rapid change sequence, healthcare leaders

are moving to a more continuous and integrated strategic management process. The adaptability of a more dynamic process increases an organization's ability to deal with "curveballs", emerging developments and threats, and changes in general. There has been a shift from traditional periodic strategic planning to ongoing strategic planning to the new concept of strategic management, which is evidenced through continuously evolving plans, managed implementation, finance, and operations integrated with planning. Annual strategic planning is more congruent with timeline expectations for current change patterns.

### **Strategic Planning Case Study**

#### **What lessons were learned from reviewing the strategic plan and progress made in XYZ HS?**

Healthcare is ever-evolving. Case study 6-1 in Roussel et al. (2023) proposed a scenario in which a large-scale health system recognized the need for a shared vision across its vast nursing community. One lesson that can be taken away from developing this strategic plan is that it is possible and necessary to involve many stakeholders in strategic planning. The case study described two of the three steps in Kurec's (2014) three-step process of developing the strategic plan which are creating new ideas and reducing & combining. By following this process, input can be collected from a large group and whittled down. The greater the number of stakeholders engaged in the process, the more individuals become invested in the success of the mission. Another takeaway is a point discussed by Drenkard (2012), who refers to the importance of being proactive rather than reactive in improving nursing performance and patient experience. The case study refers to this as "the threshold from the care we have to the care we need". This is

a powerful statement that drives home the point that healthcare is not a static field (Roussel et al., 2023).

**What factors were most significant in driving 47 diverse hospital nurse leaders toward a common mission and strategic priorities?**

One of the most significant factors in driving the nurse leaders of 47 diverse hospitals was the acknowledgment that reform was needed to remain sustainable. Such efforts were proactive versus reactive and indicative of a strong leadership infrastructure. Leaders recognized unification as a critical element for the successful implementation of healthcare reform across the large medical system. The adoption of the Patient Protection and Affordable Care Act in 2010 heavily emphasized the need for a reformed healthcare delivery system. Additionally, the Institute of Medicine (IOM) and Robert Wood Johnson Foundation report in 2010 identified the industry was fractured with barriers affecting the ability to provide cost-effective, high-quality care. Berwick's urgency at the Institute for Healthcare Improvement national forum in 2011 further demanded reform in the healthcare industry. Finally, in 2012, the Advisory Board Company released a report integrating nursing innovation throughout the five core components of reform including service, quality, finance, people, and growth further illustrating the need for reform.

**How do size and scope help and/or hinder strategic process?**

Size and scope can either help or hinder the strategic process. Large healthcare systems and change management within them may be more complex than a smaller healthcare system, but large systems also offer more diversity, and division of labor is easier to achieve. Large systems may offer greater ideas and opportunities, so long as there are not too many decision-makers involved, impeding the process. Larger systems may also divide specialties and offerings

across differing geographies to offer a wider range of services. Conversely, smaller systems may lack the buy-in and resources necessary for successful implementation. Smaller entities will be challenged with other nuances, such as doing more with less, collaborating with larger external systems, and prioritizing which needs are critical to their geography and market.

**Of the key steps articulated, which do you think was most important?**

Both awareness and focus played important roles in contributing to the overall success of this health system creating a shared vision and strategic plan. Awareness is essential as it involves engaging stakeholders, including nurses, administrators, and other key personnel, in understanding the strategic goals and objectives (Roussel et al., 2023). An understanding of the plan ensures a unified vision and commitment from the healthcare team. However, without focus, the plan risks becoming a collection of well-intentioned initiatives lacking coherence. Focus directs the collective energy towards specific priorities which ensures efficient allocation of resources and sustained efforts in areas that align with the hospital's overarching mission. While awareness establishes the foundation, focus acts as the guiding force. When both work together, it enables the hospital system to translate strategic intent into tangible and impactful nursing practices. It is difficult to identify one step as more important as a delicate balance between these two steps is crucial for the successful execution of a nursing strategic plan. However, without awareness, focus cannot happen. So if one step must be deemed as more critical than the other, awareness is more important.

**Are there other steps you would advise employing in this process?**

A couple of concepts were not evident in the case study as it was presented. Strategic planning should not only include executive leaders but also staff-level input to assist in identifying what the key needs are. Any practice changes that will take place will impact patient



safety and care, thus the direct care staff should have a place at the decision-making table to advocate for best practice. A true shared governance approach would include staff member involvement. According to Roussel et al. (2022), changes in culture are needed in the healthcare environment to strengthen nursing practice. Including clinical nurses in shared governance fosters cultural improvement. Further, additional stakeholders internal and external to the health system should be included in the planning or brainstorming part of the process to ensure all factors are considered. The level of impact that they may offer may significantly impact outcomes.

### **Application**

#### **What is the purpose and components of a strategic plan?**

A strategic plan serves several important purposes for an organization. Firstly, it establishes the organization's vision of success and prioritizes key activities that provide clear direction and focus. Secondly, it encourages collaboration and ensures that everyone is working together towards common goals. Thirdly, a strategic plan simplifies decision-making by clarifying priorities and rejecting distractions. Lastly, a strategic plan ensures focus on priority. Documentation, communication, and proactive implementation transform a plan into a tangible guide that shapes organizational actions and decisions (Pulaski, 2013).

The four major components of a strategic plan are outlined by Pulaski (2013). The components are learning, strategic thinking, strategic planning, and strategic action. Strategic learning is the action of gaining and processing information to move forward with understanding the breadth and scope of the issue. Strategic thinking is taking the information gathered from strategic learning and conceptualizing the issue(s). Strategic planning outlines the process by which goals and objectives will be met. Strategic action is the execution of the plan. These

components work together to overcome issues through a process that is in line with the organization's mission and values.

### **Personal Experiences with Healthcare Strategic Planning**

We have been involved in both short-term and long-term strategic planning throughout our careers. We have assisted with department and division budgeting and growth projections. Utilizing data, we have determined the best method of operation for opening or closing branch offices, developed strategies for partnering with new entities to expand hospice services, and improved communications with community partners regarding effectively managing trauma services. The above-mentioned examples involve the use of the five new imperatives defined by Zuckerman (2014). For example, determining the best method of operations and considering growth or closures utilizes the imperative of sufficient scale, scope, and niche play to ensure organizations scale up to survive or consider growth through mergers, acquisitions, and new partnerships. We have done much of this in the hospice market to ensure long-term care facilities and residents get the services necessary for residents with a six-month or less prognosis.

Maximizing resources and enhancing partnerships allows for cost-competitive approaches and increases value. We have seen such strategies offer successful collaboration with community-wide entities to enhance trauma services, improve communications, and optimize clinical outcomes for emergency and trauma services. Considerations include shared office space, overlapping of overhead support, standardization, automation, and outsourcing of some services. Effects on performance across systems can be positively impacted when services and departments align to provide greater value while minimizing cost or repetition of services. Without strategic planning and awareness of what is going on in the industry, turbulence is sure to develop, leading to impaired sustainability.

## **Thinking back to what we have studied so far in this class, how does Complex Adaptive Systems play into successful strategic planning?**

According to Roussel et al. (2023), Complex Adaptive Systems (CAS) are “characterized by dynamic relationships among many agents, influences, and forces”. CAS as it relates to strategic planning acknowledges the unpredictability that is inherent when bringing together groups of people with competing priorities to identify a common goal. When an organization understands the tensions with a CAS, it can better navigate uncertainties, embrace innovation, and respond effectively to emerging challenges. When creating a strategic plan through the lens of Complex Adaptive Systems, organizations are better equipped to handle the chaos and unpredictability of human nature and respond in a way that progresses the plan rather than stalls it.

### **Role of Complex Adaptive Systems in Successful Strategic Planning**

The concept of CASs comes from the body of literature known as complexity science, chaos theory, or network science. Nurse leaders must remain fluid and adaptable to their surroundings. Accurate environmental scanning and high emotional intelligence are key factors in successful planning. Nurse leaders see themselves as agents of change and are essential to moving organizations forward by utilizing human-intensive skills to mobilize resources available to them to meet the needs of the greater good. Complexity science emphasizes the essential nature of openness to accident, coincidence, and serendipity. Strategic planning is the result of such theoretical knowledge (Roussel et al., 2023).

### **Strategic Planning Supportive Processes**

System thinking, shared governance, and clinical/nursing informatics all work in harmony to support strategic planning. Collaboration, adaptation, and innovation are the

dynamics that are going to lead to successful organizations. As the chaos of the pandemic taught us, at times of uncertainty, planning and adapting are essential to survival. Entities that were able to adjust to their surroundings and the rise out of the aftermath were those that utilized supportive processes to plan the best they could with the information they had at the time. The use of technology and data, clinical focus, and public health collaboration all came together at the height of the pandemic to provide care for the greater good. It was in those moments of chaos that some of the best innovations took place. The evolving strategic model needs to be flat, innovative, nimble, just in time, and responsive to change (Roussel et al. 2023). As we continue to recover, to thrive, organizations need to be more flexible and malleable.

### **Strategic Planning Challenges, Barriers, or Opportunities**

There are challenges to strategic planning. Time and financial demands are high. The workload can be high if teams fail to have the right people in the right numbers at the table. Delegating and decision-making are essential to working in complex adaptive systems. Barriers to strategic planning are evident in traditional leadership structures that continue to operate with the hierarchical systems that used to exist. The insulated, bureaucratic organizational models no longer make sense in the new business of health care (Roussel et al., 2023). Opportunities are evident in the environment that fosters competitive advantage, acknowledges the strengths and weaknesses of the organization, and develops functional strategies that are supported by goals, objectives, and action steps, within an organizational culture that supports the direction, and operational excellence.

### **Conclusion**

In conclusion, this strategic plan review highlights the importance of well-crafted organizational statements. The annotated bibliography explores key insights about strategic

planning from Drenkard (2012), Kurec (2014), Pulaski (2013), and Zuckerman (2013). The case study from Roussel et al. (2023), demonstrates the significance of involving numerous stakeholders in the strategic planning process and the delicate balance between awareness and focus for success. Finally, the application section provides an opportunity to reflect on the purpose of strategic planning, first-hand experience with strategic planning, and how Complex Adaptive Systems and other barriers can impact the process of strategic planning. All sections are important for a well-rounded understanding of strategic planning as it relates to nursing leadership.

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