

# Best Laid Plans:

Strategic planning and implementation in  
uncertain environments to drive  
organizational change

Kevin Lindamood, President & CEO  
Keiren Havens, Chief Strategy Officer



# STRATEGIC PLANNING



# INTRODUCTIONS



## OBJECTIVES

1. Consider the advantages of strategic planning *beyond HRSA requirements*
2. Share four principles for creating strategy
3. Brainstorm practical application of the principles



# AGENDA

- I. Four Principles
- II. Workgroups
- III. Report Backs
- IV. Wrap Up



During times of great change  
a strategic plan can help you determine

*how to navigate the future*

rather than

*what you are going to accomplish.*



# BEYOND REQUIREMENTS

- Seize the opportunity to build community
- Use as a catalyst for cultural change
- Demonstrate your commitment to transparency

## #1: Consider Your Lens

1

# BEYOND REQUIREMENTS

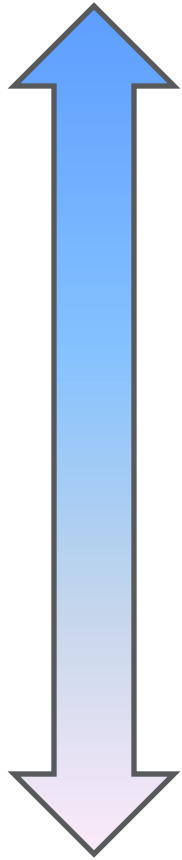
- Broaden your self-definition
- Trust the community
- Put outliers in their place

## #2: Be Inclusive in Your Approach

2



# COMMUNITY PARTICIPATION GRADIENT



**Co-opted:** Tokenism; community reps are chosen by staff, but have no real power or input.

**Cooperation:** Tasks are assigned, with incentives. Staff decide agenda and direct the process.

**Consultation:** Community opinions sought. Staff analyze data and decide on course of action.

**Collaboration:** Community members work with staff to determine priorities. Responsibility remains with staff for directing the process.

**Co-learning:** Community members and staff share their knowledge to create new understanding and work together to form action plans with outside facilitation.

**Collective Action:** Community members set the agenda and mobilize to carry it out, utilizing staff, NOT as initiators or facilitators, but as required.

# BEYOND REQUIREMENTS

- Beyond the “road map”
- Build in flexibility
- Create a sequence

3

**#3: Don't Forget the “Strategy” Part**

**“BY DESIGN, THIS PLAN LACKS THE DETAILED BENCHMARKS AND TIMELINES OF PAST STRATEGIC PLANNING EFFORTS.”**



# BEYOND REQUIREMENTS

- Use the plan as your lens
- Internalize the plan
- Dedicate staff time to lead

4

## #4: Support Strategy with Structure

# 2014 Leadership Team Retreat Agenda

- I. Planning Framework: Priorities and Assumptions
  - A. Strategic Plan
  - B. Multi-Year Initiatives
  - C. Basic Budget Assumptions
- II. Planning Process & Calendar: Discussion
  - A. Budget Process
  - B. Program Process
- III. Planning Process: Agency Engagement Strategy
  - A. Leadership Role of Directors
  - B. Structure
- IV. Next Steps & Deadlines



# FOUR WORKGROUPS

## 1) Consider Your Lens

What cultural changes need to happen in your organization? How can the strategic planning process help make those changes happen?

## 2) Be Inclusive in Your Approach

How can you create an environment for others to build and own the strategic plan?

## 3) Don't Forget the "Strategy" Part

Your goal is to have "an empowered and engaged workforce." What's your strategy?

## 4) Support Strategy with Structure

How can you keep the strategic plan from sitting on a shelf?

<<PEOPLE, SYSTEMS AND STRUCTURES>>



**20 MINUTES**  
3:24:08 PM

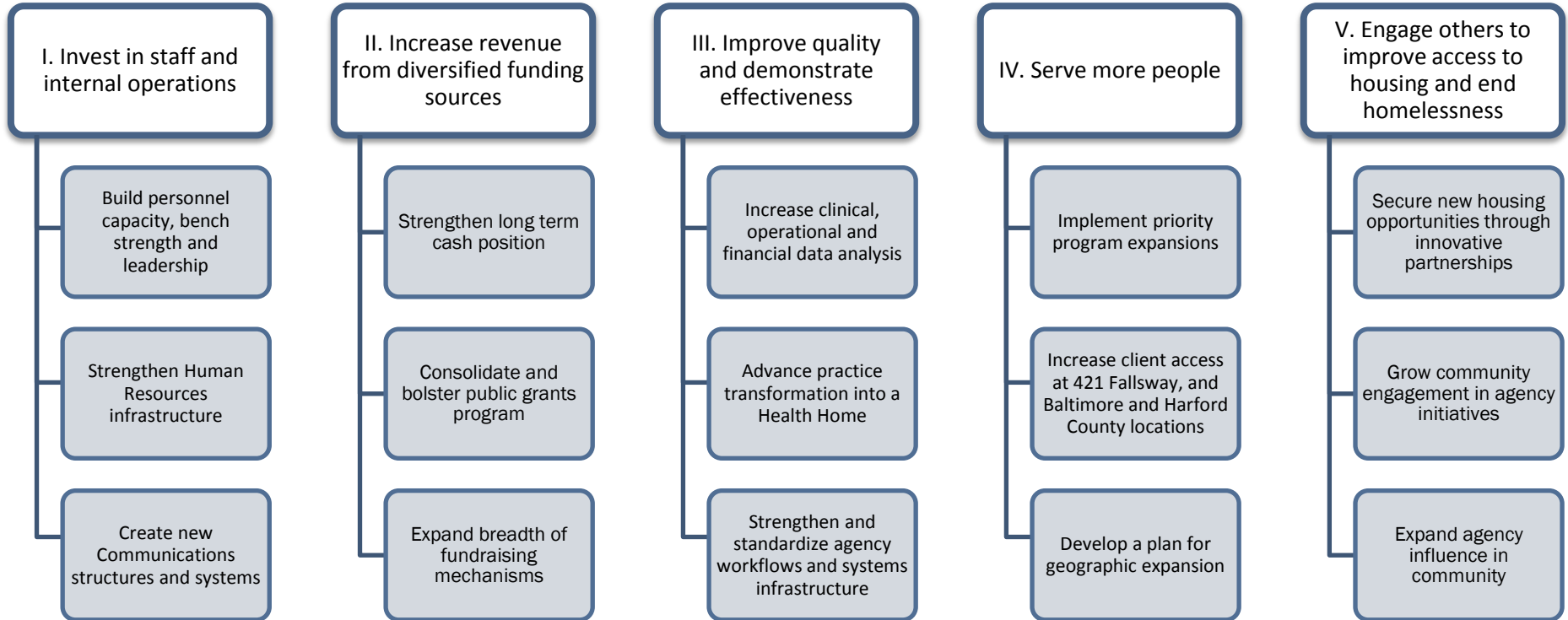


# REPORT BACK





# STRATEGIC PLAN IMPLEMENTATION: 2015 PRIORITY INITIATIVES



# STRATEGIC PLAN IMPLEMENTATION: 2015 PRIORITY INITIATIVES

## Strategic Plan Theme IV.

## 2015 Priority Initiatives

## Actions by December 31

IV. Serve more people

Implement priority program expansions

1. Offer psychiatric occupational therapy
2. Offer Hepatitis C treatment
3. Offer transgender care
3. Implement universal client screenings
4. Expand contraceptive services and improve access to obstetrical care (2016)

Increase client access at 421 Fallsway, and Baltimore and Harford County locations

1. Expand Mental Health and Dental services offsite
2. Introduce agency-wide customer service training
3. Operationalize all-day walk-ins across all lines of service

Develop a plan for geographic expansion

1. Review and ensure HRSA scope alignment in preparation for growth
2. Research and plan growth into West Baltimore (2016)
3. Develop a plan for Baltimore County site expansion (2016)

Q&A



**THANK YOU!**

Continue the conversation:

[klindamood@hchmd.org](mailto:klindamood@hchmd.org)

[khavens@hchmd.org](mailto:khavens@hchmd.org)

