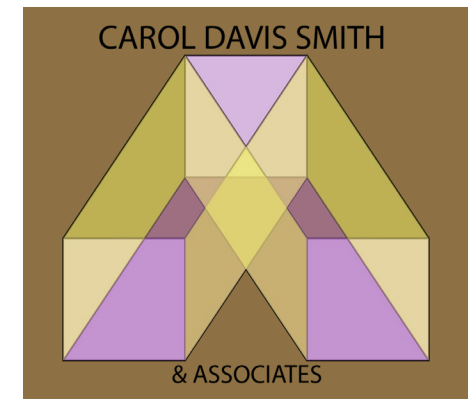


Strategic Planning for HTM Departments – a workshop

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Why should I care about strategic planning?

- **Influence** the prioritization of tasks assigned to HTM and integrate priorities identified by HTM
- **Communicate** with executives
- **Align** HTM staff goals and objectives so they see how their work fits into the organizational strategy and objectives
- **Financial Stewardship** of organizational resources (i.e. cost savings and cost avoidance)

Today's Agenda

- Define strategy and highlight the components of a strategic plan
- See sample HTM strategic plan components
- Draft a simple HTM strategic plan to jumpstart your department's strategic planning process

Strategy

a plan of action or policy designed to achieve a major or overall aim

Components of a Strategic Plan

Mission & Vision

Guiding Principles

Goals – the “major or overall aim”

HTM Strategy

A collection of goals to be achieved through specific, measurable initiatives that enable the HTM department to operate within their Guiding Principles, successfully execute their Mission, and realize their Vision for the future.

Mission & Vision

Mission Statements

ABC Health System exists to provide high quality, affordable healthcare and improve the communities we serve.

HTM enables safe, high quality, and affordable patient care through medical technologies and operational excellence.

Vision Statements

ABC Health System will be the preeminent provider of healthcare services in the region.

HTM will deliver the right technology, at the right location and right time with the right support to ensure the right clinical outcomes.



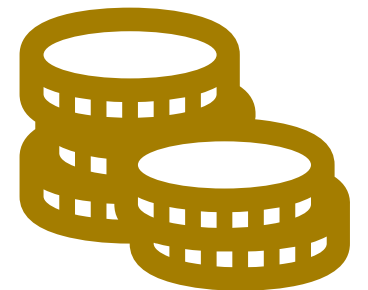
Guiding Principles

(aka, Values)

Is this good enough for my family?

Does this improve the clinical outcome –
faster and/or better access, diagnosis,
treatment, and/or safety?

Does this demonstrate good stewardship of
our resources – people, time, money?



Goals

Stretch yet achievable

Quantifiable, measurable

Achieved through specific initiatives



Goal

Descriptive narrative of the goal and problem it will address.

Recruit, hire, and retain top talent to minimize the number of open positions and thereby reduce the negative impact on HTM and clinical operations.

(People)

Descriptive narrative of what happens if this goal is not achieved.

Increased direct (repair) and indirect (clinical operations impact) costs due to delayed completion of repairs and/or repairs sent to external service organizations

Descriptive narrative or list of resources are required – people, time, money

standardized job descriptions (time)

dedicated recruiter (time+\$)

job postings (\$)

department reorganization (time+\$)

Sample Format - goals

Initiatives

(Goal - People)

How would you measure each initiative?

Initiative #1

Descriptive narrative of the activity to be executed in support of this Goal. These are tactics in support of the strategy.
Draft standardized job descriptions that cover existing and future positions

Initiative #2

Descriptive narrative of the activity to be executed in support of this Goal. These are tactics in support of the strategy.
Engage internal and/or external recruiter to accelerate HTM recruitment and hiring.

Initiative #3

Descriptive narrative of the activity to be executed in support of this Goal. These are tactics in support of the strategy.
Define and implement processes to measure employee satisfaction, assess the level of satisfaction, and define action plans to support staff retention.

Sample Format – initiatives

HTM Strategic Plan Goals



Future State

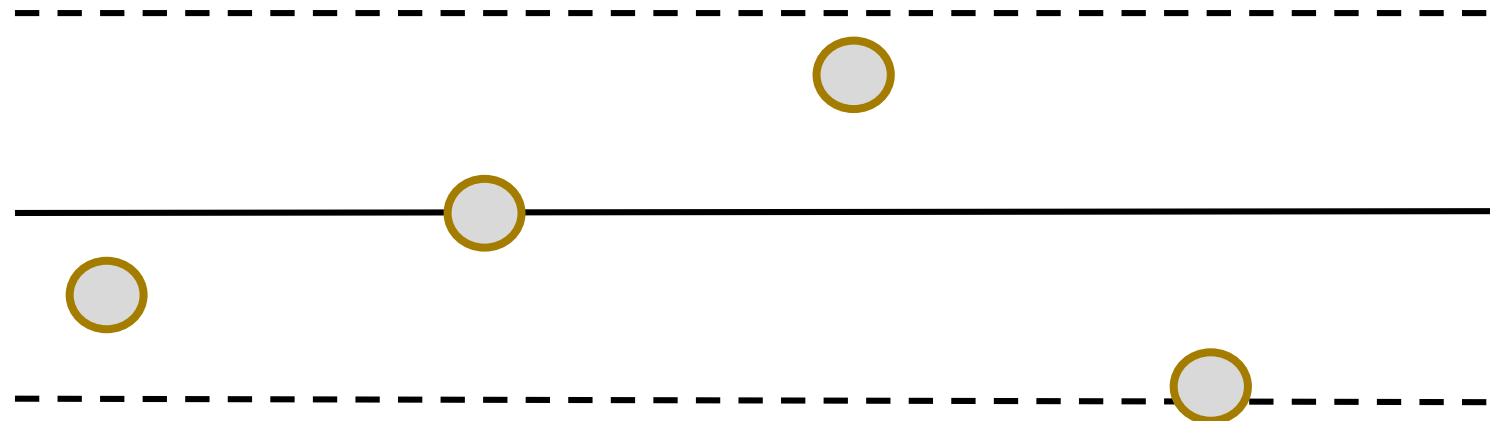
Descriptive narrative of the HTM department after the goals are achieved – taken directly from mission/vision statements.

Status Report

Descriptive narrative of the progress to date.

CMMS conversion 80% complete

Primary focus on People Goal



Current State

Descriptive narrative of the HTM department before the goals are initiated.

Sample Format – high level exec summary

HTM Strategic Plan

People Goal

Recruit, hire,
and retain top
talent (People)

Standardized
Job
Descriptions

Dedicated
Recruiter

Employee
Satisfaction
Process

Initiative #4

Future State

Descriptive narrative of the goal after the initiatives are successfully completed.

Status Report

Descriptive narrative of the progress to date.

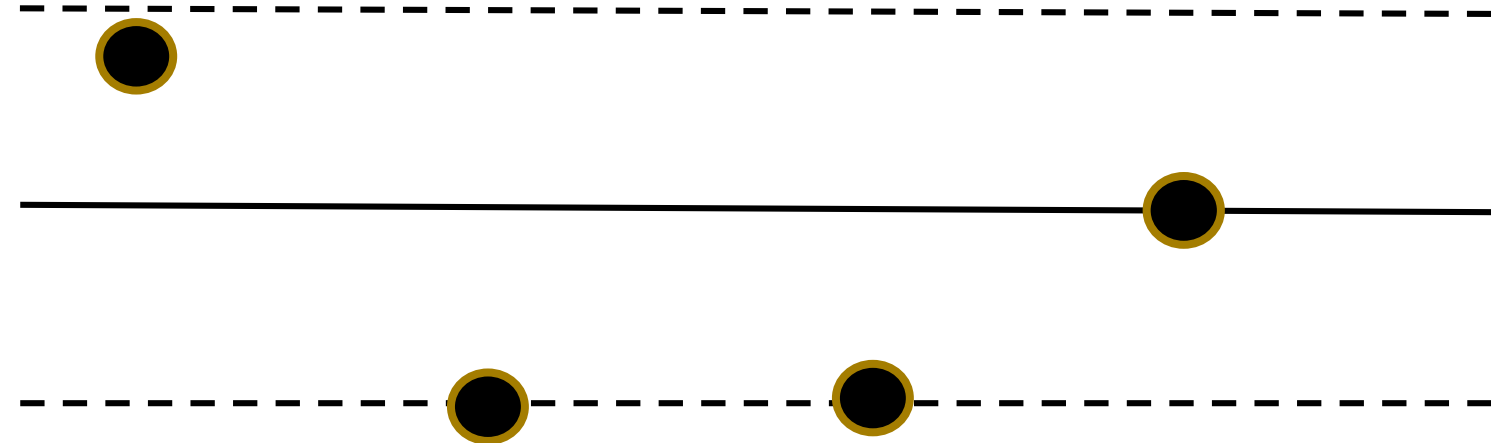
All existing job descriptions categorized.

New positions identified and categorized.

Discussions underway to identify recruiter.

Current State

Descriptive narrative of the goal before the initiatives are started.



Sample Format – goal level summary



Workshop

Mission & Vision

Purpose & Future State

ORGANIZATION

HTM DEPARTMENT

Guiding Principles

Values and behaviors

Goals

-
-
-
-

Goal #1

Descriptive narrative of the goal and problem it will address.

Descriptive narrative of what happens if this goal is not achieved.

Descriptive narrative or list of what resources are required – people, time, money, etc.

Goal #1

Initiative #1

Descriptive narrative of the activity to be executed in support of this Goal. These are tactics in support of the strategy.

Initiative #2

Descriptive narrative of the activity to be executed in support of this Goal. These are tactics in support of the strategy.

Initiative #3

Descriptive narrative of the activity to be executed in support of this Goal. These are tactics in support of the strategy.

Goal #2

Descriptive narrative of the goal and problem it will address.

Descriptive narrative of what happens if this goal is not achieved.

Descriptive narrative or list of what resources are required – people, time, money, etc.

Goal #2

Initiative #1

Descriptive narrative of the activity to be executed in support of this Goal. These are tactics in support of the strategy.

Initiative #2

Descriptive narrative of the activity to be executed in support of this Goal. These are tactics in support of the strategy.

Initiative #3

Descriptive narrative of the activity to be executed in support of this Goal. These are tactics in support of the strategy.

Goal #3

Descriptive narrative of the goal and problem it will address.

Descriptive narrative of what happens if this goal is not achieved.

Descriptive narrative or list of what resources are required – people, time, money, etc.

Goal #3

Initiative #1

Descriptive narrative of the activity to be executed in support of this Goal. These are tactics in support of the strategy.

Initiative #2

Descriptive narrative of the activity to be executed in support of this Goal. These are tactics in support of the strategy.

Initiative #3

Descriptive narrative of the activity to be executed in support of this Goal. These are tactics in support of the strategy.

Goal #4

Descriptive narrative of the goal and problem it will address.

Descriptive narrative of what happens if this goal is not achieved.

Descriptive narrative or list of what resources are required – people, time, money, etc.

Goal #4

Initiative #1

Descriptive narrative of the activity to be executed in support of this Goal. These are tactics in support of the strategy.

Initiative #2

Descriptive narrative of the activity to be executed in support of this Goal. These are tactics in support of the strategy.

Initiative #3

Descriptive narrative of the activity to be executed in support of this Goal. These are tactics in support of the strategy.



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Carol Davis-Smith & Associates, LLC provides a consultative bridge between technical, clinical, and strategic perspectives in healthcare through our passion for excellence, creativity, and integrity.

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