Part 1

1. This session focuses on Strategic Planning and Marketing.

2. The objective is to apply principles of strategic planning and marketing to public health. Planning is a major focus of top administrators in health agencies and organizations. It is the process by which organizations move from where they are today to some desired future. In contrast, marketing is the activity of selling products or services in ways that make them desirable to consumers. In public health, marketing efforts are used to improve societal health by influencing health behaviors or in public policies that impact health behaviors.

3. Planning is an orderly process that provides direction to all efforts in an organization or agency. It is a means of managing uncertainty by anticipating environmental changes and responding in advance. Planning communicates priorities to employees, which then allow employees to make decisions consistent with plans. It is essential to sound leadership. Disaster planning provides an example of the major importance of planning in public health.

4. Planning is the responsibility of top management; however success requires input and participation from employees at all levels of an organization or agency. To be useful, a plan should be succinct and easy to read. It is essential that employees understand their role, as articulated in plans. For example, organizations conduct drills of their disaster plan in order to assure everyone understands the plan and their role in achieving the desired outcome.

5. A strategic plan is a plan for all activities of an organization. The foundation for a strategic plan is the organization's mission and values. From this, top management creates a vision for change and the planning process is used to articulate specific goals and objectives. Thus, the first phase of strategic planning is formulating the direction, as stated in a mission, values, vision, goals, and objectives.

6. The mission is an organization’s purpose in business. It is what the agency or organization does. The mission or purpose infrequently changes and it should differentiate one organization from another. For example, the mission of the Florida Department of Health is not changing; however, how they achieve their mission does change over time.

7. The mission of an organization gets translated into a mission statement. Many people have difficulty interpreting mission statements and feel that they sound somewhat similar. For example, if you look at hospital mission statements, they tend to use lot of similar terms, and it might be very difficult to differentiate one mission from another. In addition, they tend to use superlatives – such as superior or excellent. We will review a few mission statements to demonstrate that a mission statement can be written to reflect the purpose that provides a foundation for management decisions.

8. In general, a mission statement should state what the organization does in business, for whom, and any uniqueness. In health, this generally translates into stating what services are provided, what community is served, and any financing constraints, meaning are services available to all or only for those who can afford to pay.
9. As an example, the mission statement of the U.S. Food and Drug Administration is provided. Their unique purpose assuring the safety, efficacy, and security of medicines, foods and other products is very evident.

10. Consider the mission statement for the Veteran's health system, reviewing the three components: services provided, communities served, and financing constraints or any other uniqueness.

11. The community they serve is very straightforward and easy to identify - America's veterans.

12. Likewise, the services are obvious. The VHA is a comprehensive, integrated health care system that provides specialized care, primary care, and medical and social support services. In addition, their mission encompasses education and research.

13. Their financing constraints are defined as value. The VHA attempts to achieve the greatest value given their budget. They have an incentive to pursue strategies that will achieve the greatest possible good for the population served. In addition, their uniqueness includes exceptional accountability, as reflected by oversight from Congress.

14. This is the mission statement of the Indiana State Department of Health.

15. In terms of what they do, the statement begins with the broader statement of “promoting health and wellness,” and then what they do as planning, prevention, service, and education. In addition, assessment, policy development, and assurance are included.

16. The community is defined as the people of Indiana, reflecting a commitment to state residents.

17. The uniqueness encompasses science, innovation, and efficiency. Efficiency pertains to achieving outcomes while minimizing cost or waste in the process.

18. This is the mission statement of a private, not-for-profit hospital.

19. Similar to a health department, they define their community as individuals in their community.

20. They exist to improve the health of individuals in their community. In addition to disease prevention and health education, their services include delivery of health care services.

21. In addition to a commitment to quality, they state a commitment to value and service. With regard to financing constraints, they explicitly state “without regard to financial status.” This reflects a charitable mission and a commitment to serving the poor and uninsured.

22. Some medical centers have a religious affiliation, which is a fundamental uniqueness that is stated in their mission.

23. The Mayo Clinic is a private not-for-profit organization, with clinics and affiliated hospitals in Minnesota, Arizona and Florida. The Mayo Clinic attracts patients from around the world, since they provide comprehensive and integrated specialty care. As such, their community is defined as “every patient.” It is not restricted to a particular geographic community. Thus, the mission does not make a commitment to a particular geographic community or to charity care.
24. As mentioned, in addition to mission, values are also a foundation for planning. Values are the guiding principles of an organization. Similar to the mission, they are difficult to change.

25. To create a values statement, an organization needs answer the following questions. How do we treat our customers? How do we want to be viewed in the community? How do we treat employees? What employee attitudes and behaviors do we want to reward? What is the most important value that we want expressed in our workplace? Finally, how do we define ethical behavior?

26. These are values clusters. Central is social responsibility, which reflects values that are good in themselves, such as taking responsibility for persons in communities. Health departments clearly identify social responsibility as a key value. Private organizations may or may not do so.

27. Mastery values recognize achievement and success in the workforce, relative to current knowledge, skills and techniques. Self development values embrace expanding the capabilities of the workforce, such as fostering the continued growth and development in knowledge and skills. This permits employees to contribute back to the organization and also creates opportunities for them to move into positions of greater responsibility. Relationships values recognize the importance of helping others in the workplace. Competition can exist in some organizations where employees are reluctant to share information for fear that someone else will use it to advance their own position.

28. Continuity values focus on maintaining stability and predictability. In particular, it assures employees understand the expectations and the related rewards and consequences. Further, customers can expect a certain level of predictability. A common complaint is long waits in physician offices. Any unpredictability in waits, will it be a half hour or a half day, would reflect lack of continuity values. Lifestyle values pertain to the way people work and live. By ignoring the personal life of employees, a company is not focused on lifestyle values. Organizations that place the job requirements as more important than an employee’s personal life can have difficulty in recruiting and retaining employees.

29. If we look at how values can be reflected in organizations, one dimension is friendliness to customers. For example, Wal-Mart stores have a greeter to assist customers at the front door. This can be useful, especially if one needs information. In contrast, the Safeway grocery store chain, tried to establish a policy on friendliness towards customers. They required employees to smile at customers when dealing with them. This created problems for women as their smiles were sometimes misinterpreted as interest in their male customers, sending the wrong message. The policy had to be abandoned. This demonstrates that there are sincere ways to assist customers and insincere tactics.

30. This is the value statement from the Indiana State Department of Health. The values clusters discussed are reflected throughout the statement, as noted in the red highlighted areas.