



ADVOCATETM
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Purpose-Driven Planning: Building a Stronger Future for Your Health Center

Virginia Community Healthcare Association Annual Conference

Micah Dalton

Linda D. Wilkinson

September 24, 2025

The world around us is changing

Regulations

Fundraising

Cultural Norms



How can we respond?

JOAN MAGRETTA

UNDERSTANDING
MICHAEL
PORTER

*The Essential Guide to
Competition and Strategy*

HARVARD BUSINESS REVIEW PRESS

Strategy is about making choices, trade-offs; it's about deliberately choosing to be different.

Michael Porter

"Your strategy is about the **choices** you make given your **current capabilities** to achieve the **vision** for your organization."

-Micah Dalton



Objectives and Agenda

Learning Objectives

- **Discovery for current & future states**
- **Gap assessments**
- **Implementation planning**



Agenda

- **Welcome**
- **Introduce the elements of a strategy**
- **Share tools**
- **Discuss some use cases**

...and we'll try to have a little fun!

Who are we & why are you listening to us:

Micah Dalton



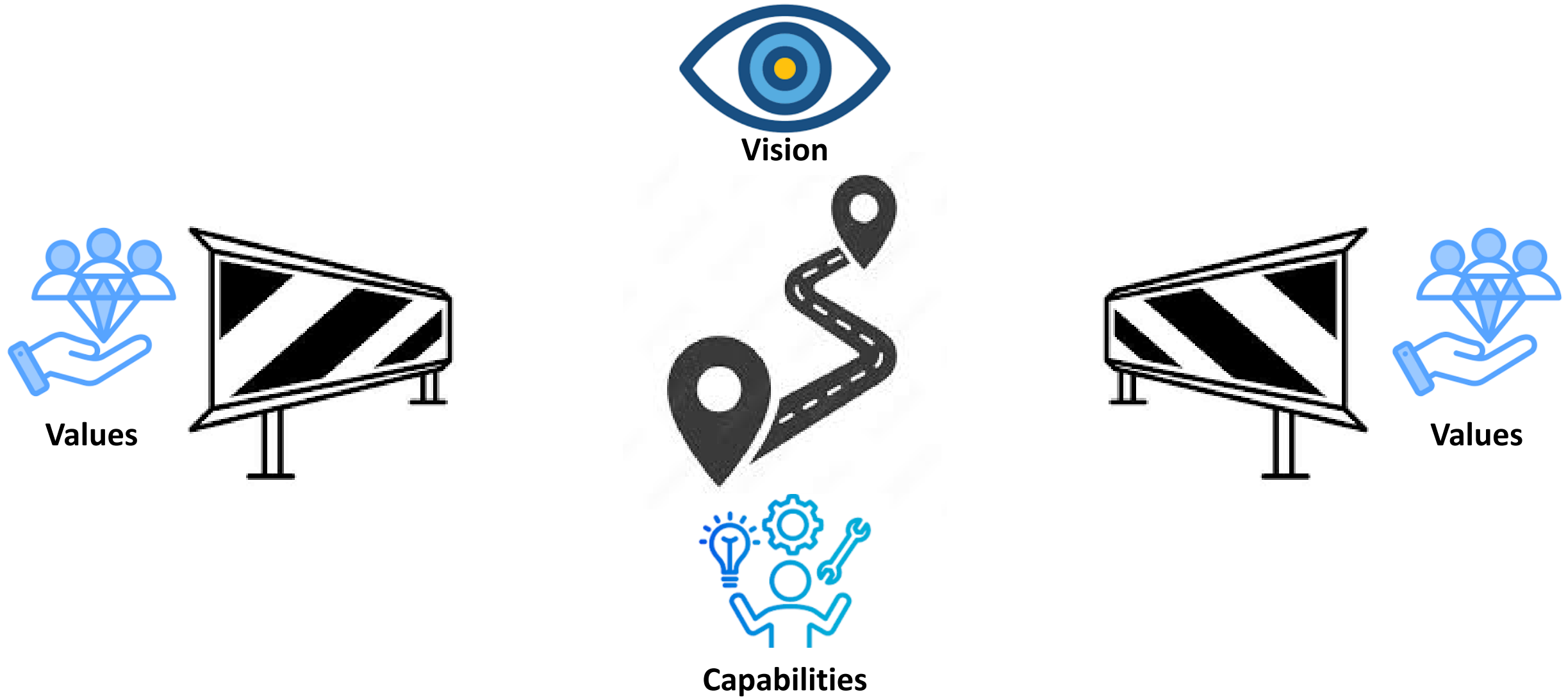
- **Founding Principal of DLG Strategic**
- **Expertise in organization management, operations strategy & execution, financial analysis, procurement strategy and cost management, operations analysis and management, and root cause identification**
- **Duke University, Fuqua School of Business, MBA**
- **University of Virginia, Darden School of Business/McIntire School of Commerce, MSBA**
- **Board Member & Governance Committee Chair, Sabot School**

Linda Wilkinson



- **DLG Consultant**
- **35 years in healthcare administration, operations, governance, philanthropy, and executive leadership (former CEO of VAFCC – still love the safety net!)**
- **Randolph Macon College (BA) & VCU alumna (MPA); CFRE**
- **University of Virginia, Sorensen Institute for Political Leaders**

Your strategy must be uniquely yours to attract customers, talent, and enable success



Values: What are the organization's non-negotiables?



Values

- When is this organization the most successful?
- What makes you proud of the organization?
- What experiences matter most to you and the organization?
- How do you want people to feel when interacting with the organization?
- What is truly important?
- How do you declare and demonstrate your values to all stakeholders?

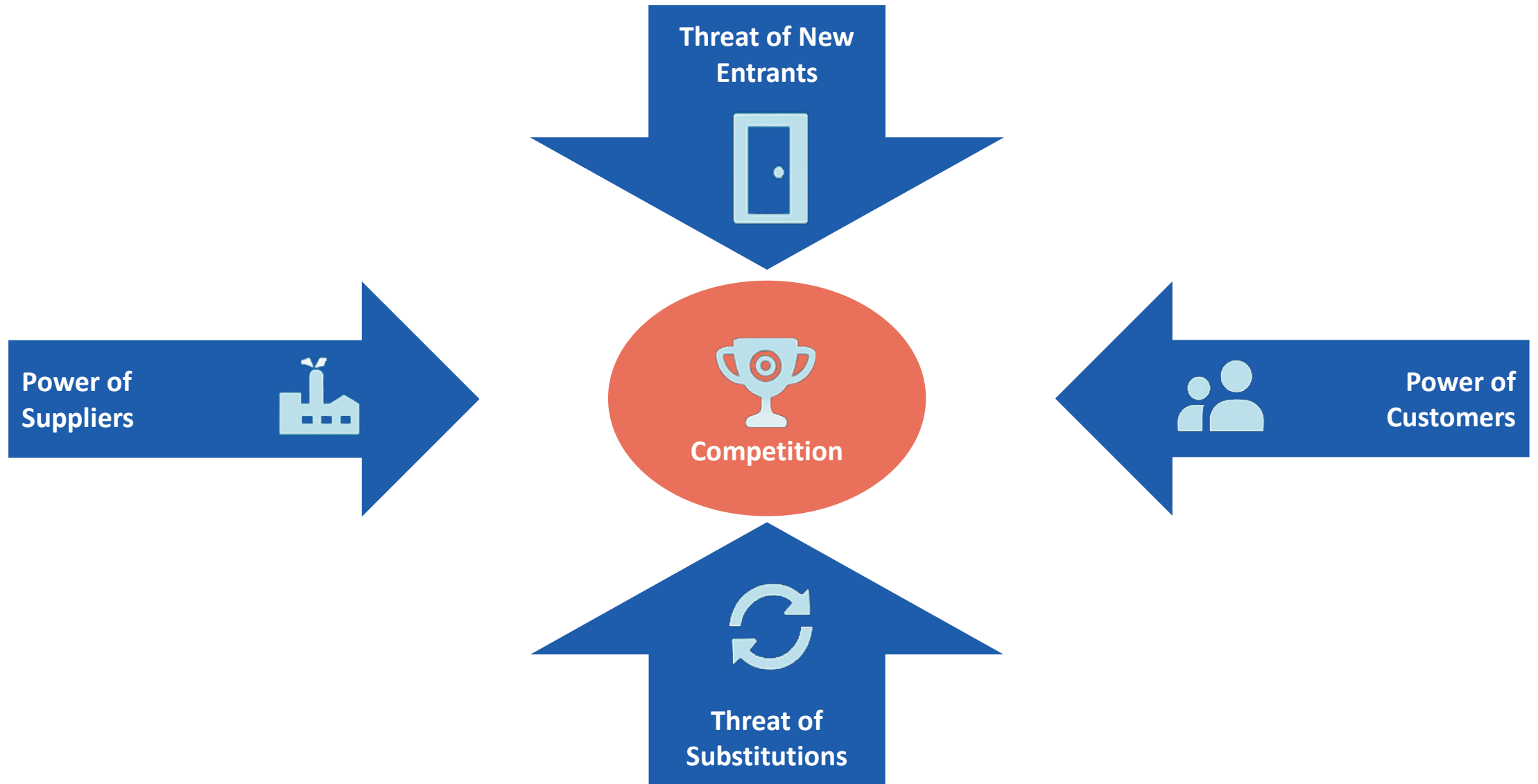
Inconsistencies in leadership style and expectations must be addressed for the organization to succeed

SWOT: How is this organization uniquely positioned to address the opportunities in the market?

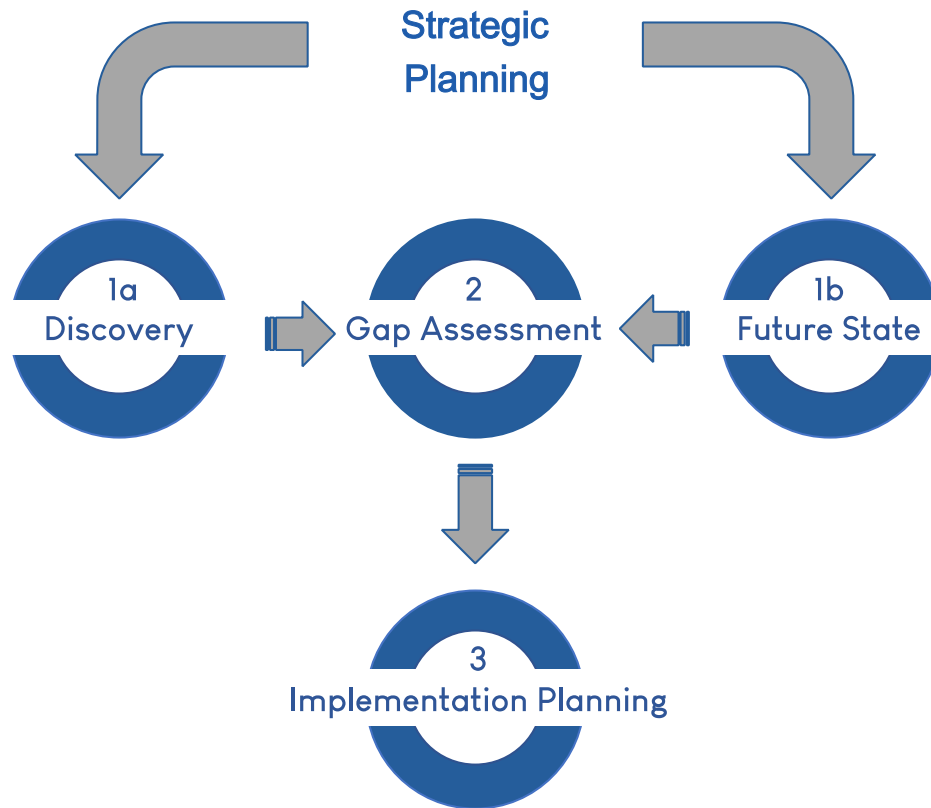
Internal		External	
Strengths	Weaknesses	Opportunities	Threats
Characteristics about our business that give it an advantage over others in our market	Characteristics about our business that put us at a disadvantage relative to others in our market	Elements in the environment that our business could exploit to our advantage	Elements in the environment that could cause trouble for or harm our business

Most importantly, the SWOT articulates *FACTS* about our people, processes, data, technology, and market dynamics, not *OPINIONS* or brainstormed solutions

Five Forces: How do I understand the environment around our organization?



Gap Assessment: How does the organization articulate its priorities?



1 Discovery

Discovery: Current State & Future State

- What are my strengths & capabilities?
- What are my weaknesses?
- What do I need to be better at tomorrow to achieve my vision?

2 Gap Assessment

Gap Assessment

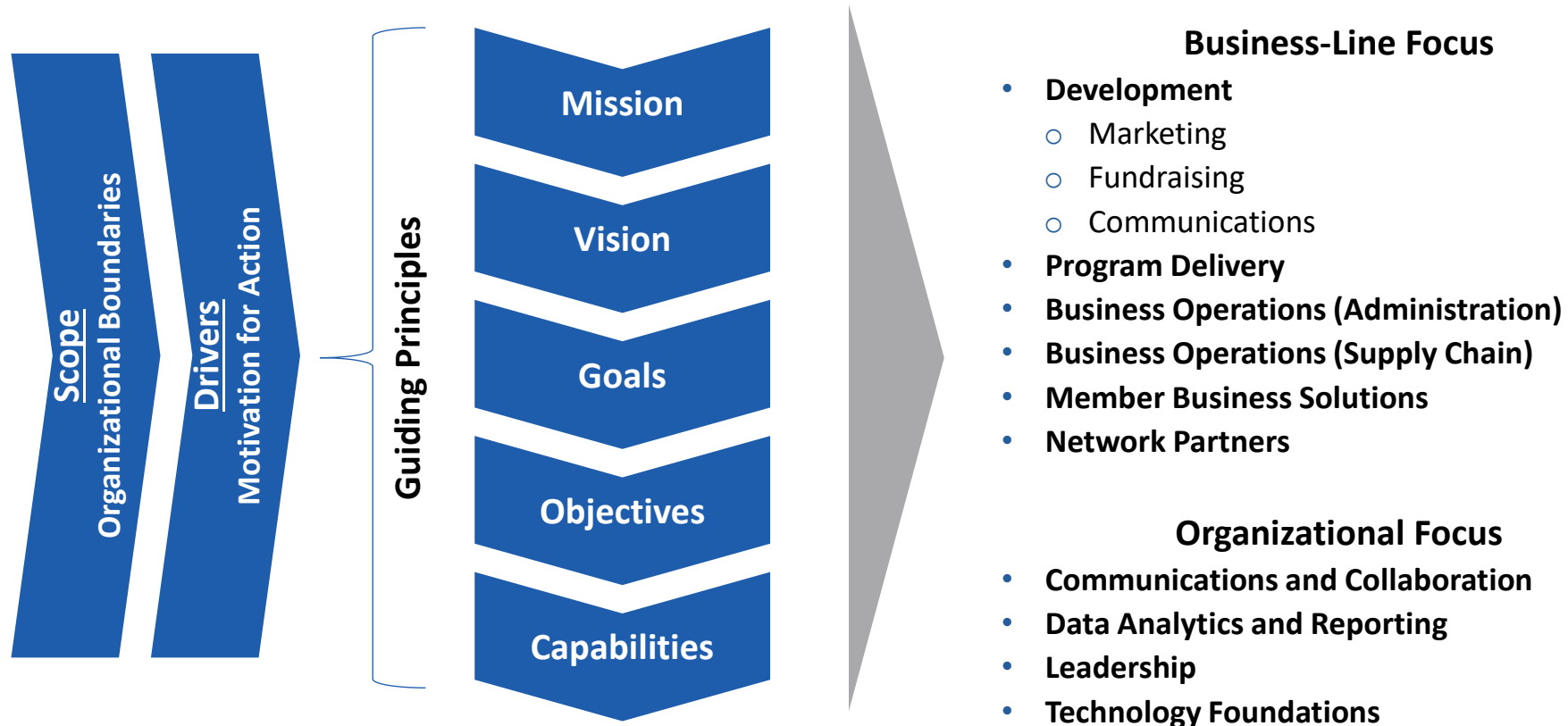
- What are the differences between where I am & where I need to be?
- How do I prioritize my needs?
- Develop recommendations that advance towards the vision

3 Implementation Planning

Implementation Planning

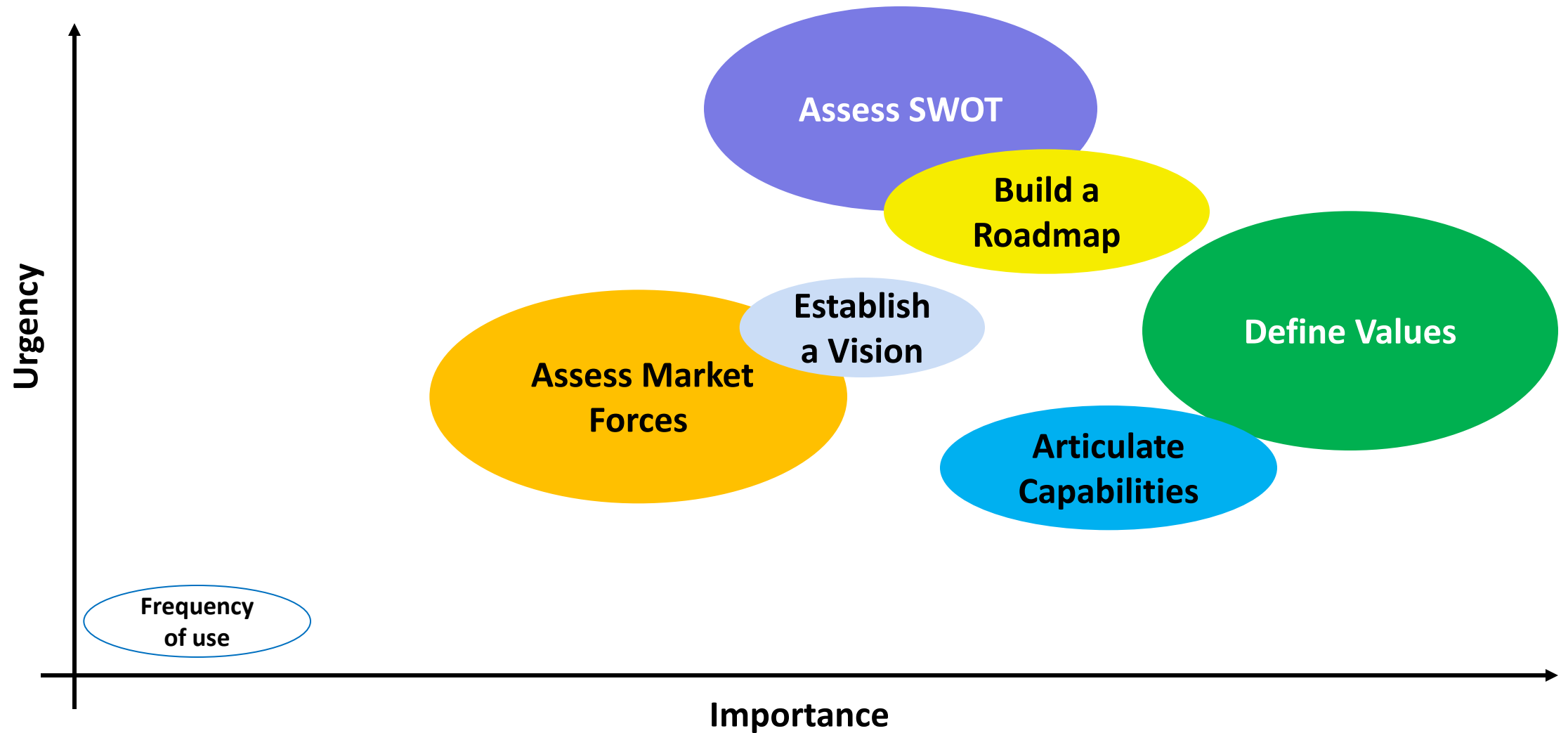
- What needs to happen first?
- Develop estimated budgets for recommendations
- Provide requirements for implementation and support

Your Guiding Principles, Mission, Vision, and Goals will be used to drive clarity in defining your strategy



The strategy development process will look through business line and organizational lenses to get the perspective of the entire organization

The tools to develop and implement a strategy can be applied in whole or in part



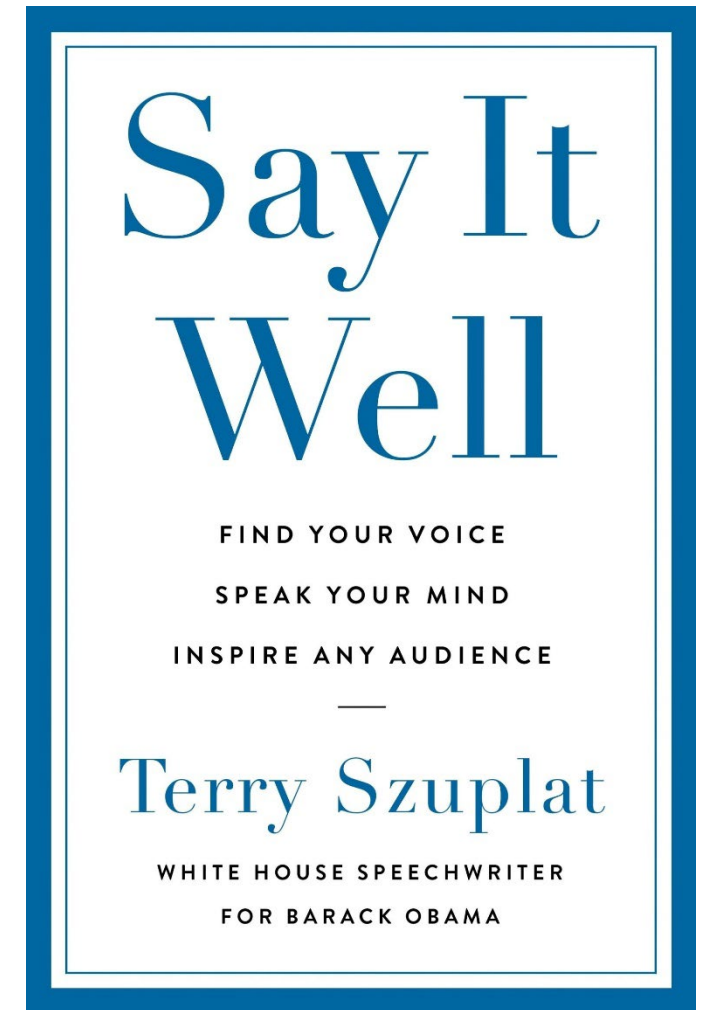
Your strategy will and must change

- **What new capabilities do I need to develop?**
- **What impact does new regulations have on my business?**
- **What can I anticipate and how do I contingency plan for those changes?**



Tell your story

- Tell a story only you can tell
- Find an emotional connection to your message
- Be authentic





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