

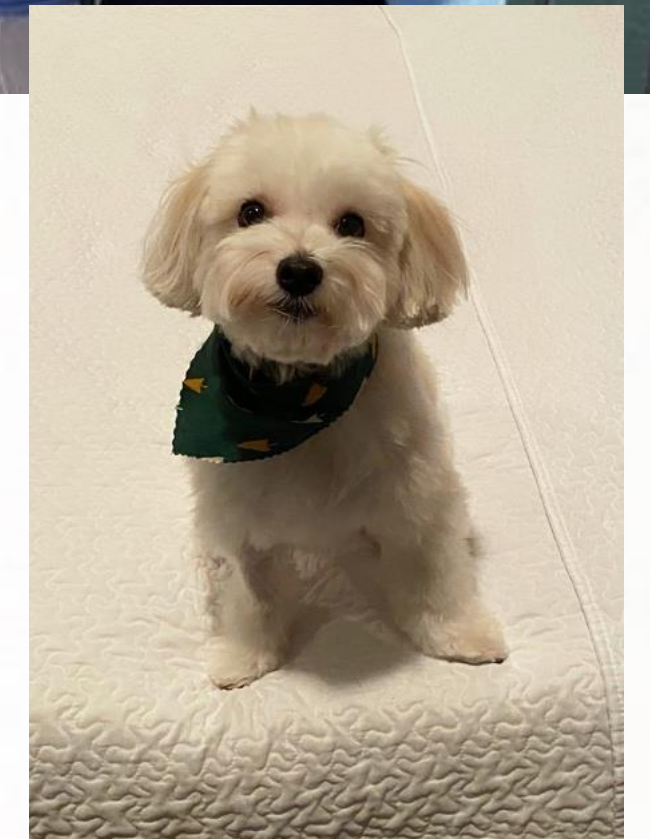
From Vision to Execution: A Streamlined, Stakeholder-Driven Strategic Planning Framework for Primary Care Organizations





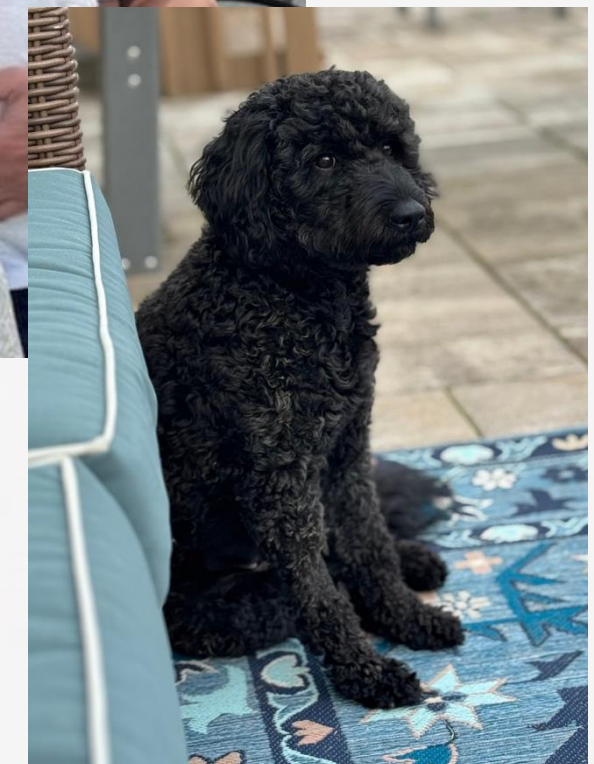
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1

What is Your WHY

2

Important Elements
Strategic Plan

3

Strategic Planning
Process & Model

4

Create a Mini Strategic
Plan





Understanding Your WHY



Freedom Summer 1964

The 1964 Freedom Summer reminds us that our work is bigger than any one moment — it's about creating lasting change and opportunity for all.



Freedom Summer activists sing before leaving training sessions at Western College for Women in Oxford, Ohio, for Mississippi in June 1964.

Ted Polumbaum Collection/Newsom



The courage and commitment of then continue to inspire our purpose today.



What is your organization's WHY



Important Elements of a Strategic Plan

Vision – Mission – Values





Do you know your organization's Vision and Mission?





What is the difference
between the two?

Vision



-  Future-focused
-  What the organization aspires to become
-  Sets long-term direction
-  Inspires and guides



A **vision** describes the future the organization wants to create.

VS.

Mission



-  Present-focused
-  What the organization does and why
-  Defines purpose and core work
-  Guides day-to-day decisions



A **mission** explains the organization's purpose, who it serves, and how it creates impact.



In short: **Vision** = where you are going. | **Mission** = why you exist and what you do.

Example of a Vision

***“To create a better every day life
for the many people”***



Example of a Mission

“[they] work relentlessly to give customers the most compelling shopping experience possible”

NORDSTROM

Remember the Purpose,
the Who, and the How!

Why Values Matter



Guide decision-making

Values help us make clear, consistent choices.



Build trust and accountability

Values help our transparency, reliability, and respect.



Shape culture and teamwork

Values align our team and strengthen collaboration.



Strengthen client and community impact

Values keep our clients and community at the center of everything we do.



ONE TEAM. ONE PURPOSE. LASTING IMPACT.

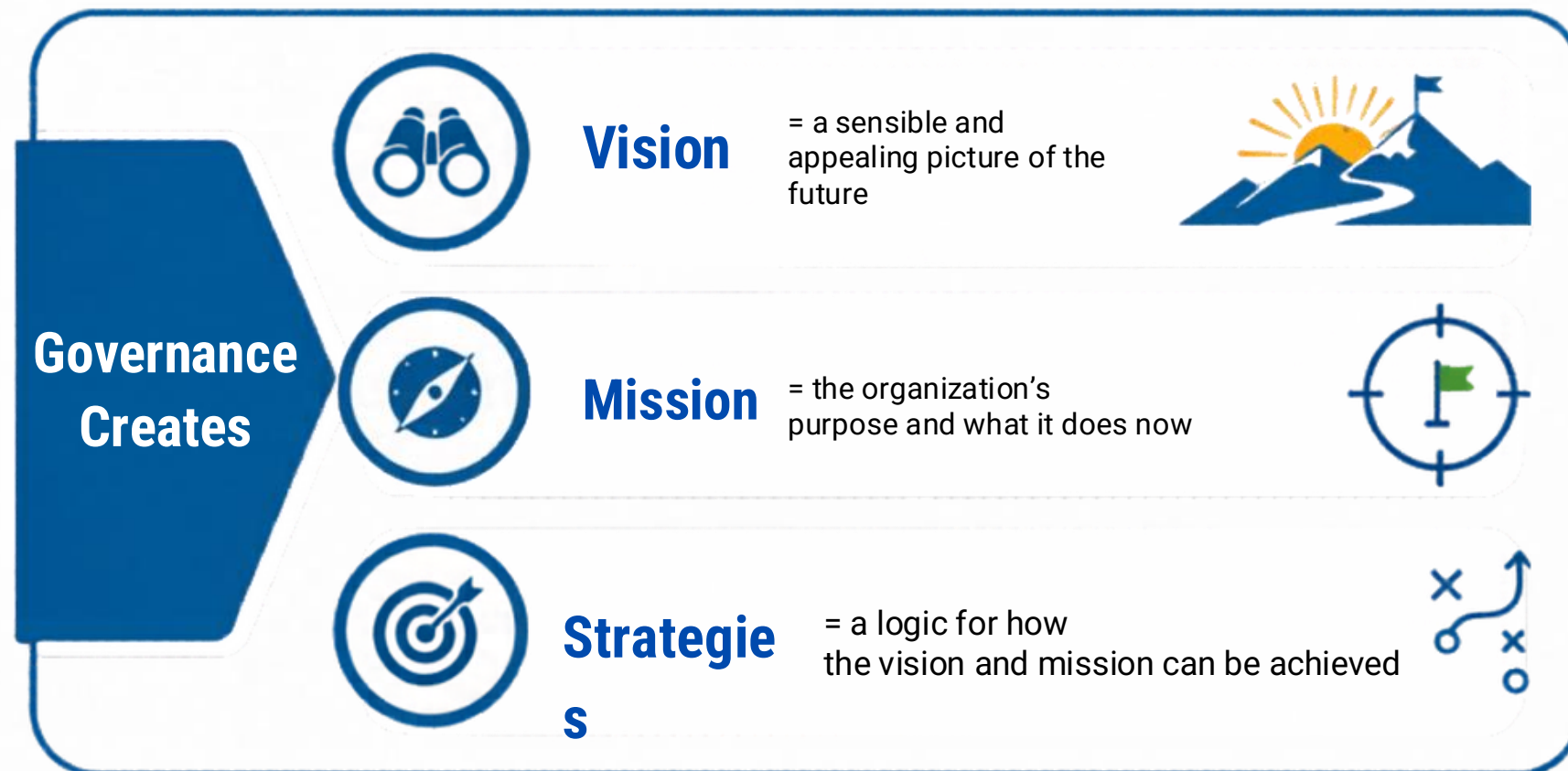


The Strategic Planning Process & Model



Strategic Planning Process

Role of your board



Role of organization's administration





**Board led, consider input
from clients and staff!**





Do you know if or how your
organizations uses its
Needs Assessment /
Environmental Scan data?





Informed by **Community**
Needs Assessment



VISION STATEMENT

Focuses on the
future and what the
organization wants
to become



MISSION STATEMENT

Focuses on the
present purpose and
what the organization
does now



STRATEGIC GOALS & OBJECTIVES

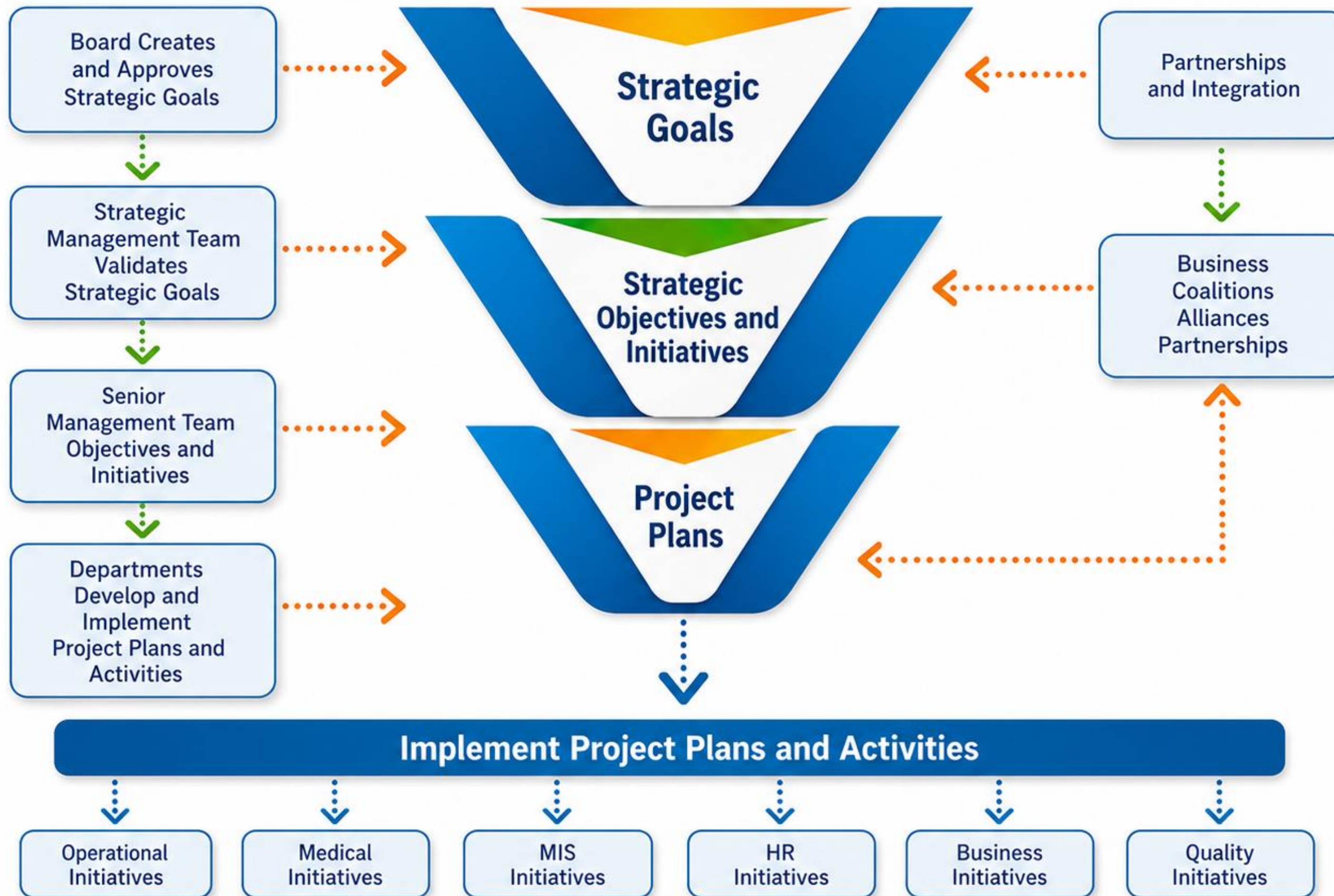
Measurable long-term
targets that guide an
organization's actions
& resources to achieve
Vision and Mission



STRATEGIC INITIATIVES

Targeted action plans
(or projects) designed
to support and achieve
the broader Strategic
Goals and Objectives

STRATEGIC PLANNING MODEL



Strategic Goal vs. Objective vs. Initiative

How each part of strategic planning works together

Strategic Goal



A broad, long-term result the organization wants to achieve.



Focus

Big-picture direction



Example

Improve access to care for underserved communities.

Objective



A specific, measurable target that moves the goal forward.



Focus

Clear outcomes and metrics



Example

Increase new patient visits by 15% within 12 months.

Initiative



A project, program, or action designed to achieve the objective.



Focus

Action steps and implementation



Example

Launch evening clinic hours and a community outreach campaign.



Goal



Objective



Initiative

In short: **Goals** set direction, **objectives** measure progress, and **initiatives** drive action.

Create a Mini Strategic Plan



From Strategy to Initiaves

Each initiative can
be further
developed into a
detailed
Project Plan

Strategic Goal	Objective (SMART)	Initiative	Owner	Measure	Timeline
 Increase access to services Ensure more individuals and families can easily access the services they need.	1. Reduce wait time by 20% within 12 months. <i>(Specific, Measurable, Achievable, Relevant, Time-bound)</i>	• Implement online appointment requests	Operations Manager	% of appointments booked online	Q2
		• Add evening and Saturday hours	Clinic Director	# of evening/Saturday appointments offered	Q2 – Q3
		• Train staff on efficient scheduling workflows	HR Manager	% of staff trained	Q2
	2. Launch scheduling redesign within 6 months. <i>(Specific, Measurable, Achievable, Relevant, Time-bound)</i>	• Map current scheduling process	Operations Manager	Process map completed	Q1
		• Design and test new scheduling model	Process Improvement Lead	New model designed and tested	Q2
		• Pilot new model and refine	Operations Manager	Pilot feedback score (≥ 4/5)	Q3
	3. Decrease average days to appointment by 15% within 9 months. <i>(Specific, Measurable, Achievable, Relevant, Time-bound)</i>	• Increase provider panel capacity	Medical Director	# of providers added	Q1 – Q2
		• Optimize appointment slots	Scheduling Manager	% of appointment slots optimized	Q2
		• Monitor and adjust capacity weekly	Data Analyst	Average days to appointment	Q2 – Q3



A thoughtful initiative
includes proactively
developing Obstacles
& Contingency Plans





For every initiative, ask: What could get in the way, and what will we do if that happens?



Initiative: Launch evening store hours to improve customer access and convenience.



Potential Obstacle



Staffing shortages or scheduling challenges may make it difficult to consistently cover evening store hours.



Low customer traffic during the initial evening hours may limit the effectiveness of the extended schedule.



Contingency Plan



Develop a rotating staff schedule; cross-train employees to cover multiple roles; identify part-time or on-call staff; and begin with limited evening hours on select days before expanding.



Promote the new hours through signage, social media, email, and community outreach; monitor customer traffic and sales trends regularly; and adjust the evening schedule based on demand and peak shopping times.



Interactive Exercise: Build One Mini-Plan

Work through one priority your organization is facing now.

1

Name the strategic goal

What long-term outcome are you trying to move?

2

Write one objective

Make it specific, measurable, and time-bound.

3

Choose one initiative

What project or action will drive progress?

4

Assign ownership

Who leads, who supports, and who decides?

5

Pick a measure

How will you know it is working?

*Don't forget your
Obstacles &
Contingency Plan*

Keep it simple. If a goal cannot fit on one page, it probably cannot fit into everyday work.

Common Planning Pitfalls

These are normal. They are also fixable.



Too many priorities

Limit the plan to the few things that matter most.

No owners

Assign a clear lead for each initiative.

No measures

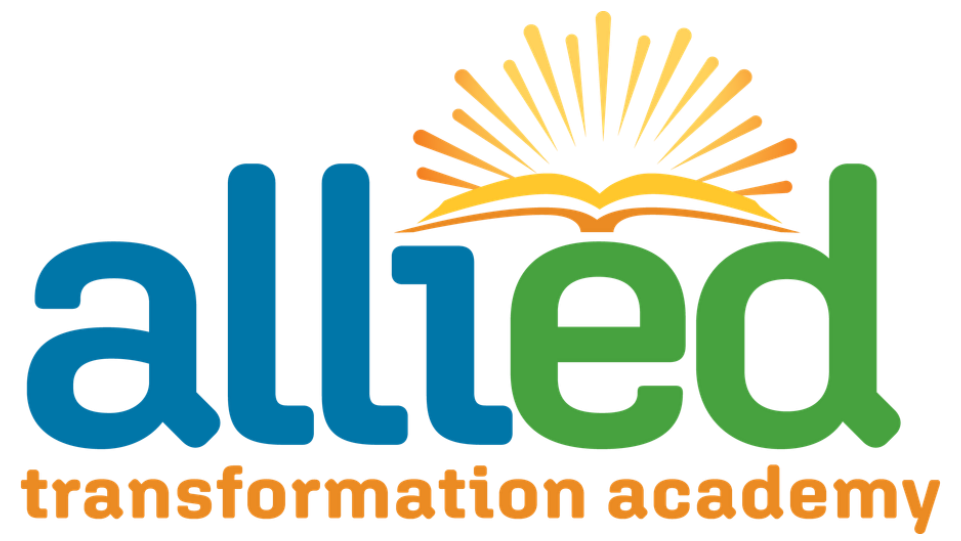
Use simple indicators so progress is visible.

No rhythm

Review the plan monthly or quarterly — not once a year.

A strategic plan should make the work clearer — not give everyone a second job.

thank you!



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