

LITS Bulletin

**Louisiana Integrated Treatment Services (LITS) Technical Assistance Bulletin (TAB)
Issued by the LA Behavioral Healthcare Taskforce
TAB No. 6**

It is the goal of LITS to develop a treatment delivery system within the state of Louisiana in which all publicly-funded Mental Health and Substance Abuse programs are Co-occurring Diagnosis Capable (CODC). In order to ensure this is done successfully across the state, each region/district will develop and implement a strategic planning process which focuses on increasing COD Capability within their area. This process will ensure the local caveats and identified needs specific to each community are adequately addressed. This TAB will provide helpful tips and tidbits regarding the strategic planning process, as well as provide links to appropriate informational resources.

“The significant problems we face cannot be solved at the same level of thinking we were at when we created them.” – Albert Einstein

“Too often the old paths are locked and the old solutions no longer solve anything.” - John Gardner

“Without a plan, the only way you get where you are going is by accident, and if you don’t know where you going, then you will end up somewhere else.” – Janet Boguch

Effective Strategic Planning

What is a Strategic Planning Process?

- A disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does and why it does it.
- A process that deals with organizational renewal, stability and managing change.
- A set of concepts, procedures and tools designed to assist leaders and managers with fundamental tasks.
- The articulation of a clear strategic vision for the future.
- Sometimes messy ☺

Instead of *Looking in the Mirror, Look out of the Window....*

Strategic planning involves looking at new approaches which are

- based on environmental conditions and outward influences.
- time selective.
- integrated throughout the organization.
- inclusive of representation of all.
- identifies improvement of targets for specific issues.

- based on unique structures of mandates.
- important to the vision, values, missions, and objectives.
- outcome-based and action oriented.

http://www.seattleu.edu/artsci/npl/modules/StrategicPlanning/SP_tab3.pdf

The Importance of Teamwork

First, there can be no teamwork unless the entire executive team understands and shares the same core values, core purpose and envisioned future. Shared values and purpose are the organization's gyroscope that keeps everyone heading in the same direction. This core ideology is particularly important during periods of rapid change. Many times resistance to change - another lack of teamwork - derives from a fear that we are going to lose what is really important in the organization.

Second, there can be no teamwork unless the team members *trust* each other. Trust is based on a mutual perception of team member's character and competence. Lacking hard data, people form perceptions based on assumptions of motivation - essentially based on hearsay, rumor, and innuendo. Sometimes organizations have members who feed the lack of trust. Playing politics requires telling different stories - always in confidence - to different people. Ascribing motivations to others - again in the strictest confidence - fosters this us vs. them mentality. These folks want to keep groups isolated since there is no way to play the political game if you are forced to open up and discuss your positions openly and thoroughly with all members of the team *at the same time*. True executive teamwork flows from:

- Reaching broad understanding and agreement on the organization's long-term vision, mission, and strategy.
- Reaching consensus on strategic goals. Because these goals change the status quo, they require teamwork to implement. *By definition they can't be accomplished by a single heroic effort or by one department working in isolation.*
- Converting strategic goals into specific objectives to be accomplished within the next twelve months - the attention span of an organization.
- Having to work together day in and day out on accomplishing these objectives. *Teamwork is strengthened by working day-to-day on achieving specific goals that represent the consensus of the team and require the entire team's support and action for success.*

Teamwork building in strategic planning meetings

A well facilitated strategic planning meeting enhances teamwork. It forces every executive team member to discuss their views on every major issue. Through the interactive discussions, each team member can judge the character and competence of every other member. They also gain a better understanding by blending and synthesizing each team member's view of each issue. With the entire team together and engaged, they

- Discuss and prioritize every major issue at a single time and place.
- Thoroughly discuss issues, enriching each team member's understanding of the true and perceived reality.
- Tell and hear the *same* story at one time and place - making it impossible to play politics.
- Define, clarify, verify and reach mutual consensus.
- Redefine and re-clarify specific goals and objectives. Once the team is in broad agreement on the organization's long-term vision, mission and strategy it can effectively work together on short-term objections and action steps.

Steps in Effective Strategic Planning - Birnbaum Associates, Business Strategy Consultants

1. Carefully select the members of your planning team. Use two criteria for selection - first make sure you include those who can, and will, contribute positively to the content of your resultant plan. Second, make sure you also include those who are positioned to drive the successful implementation of the strategies within the plan. That means leaders - both formal (per the organization chart) leaders and informal (natural) leaders.

2. Remember that strategic planning is more than an event; it's a process. Once you've developed the plan, your work is just beginning. Implementation is where you'll spend the bulk of your time and resources. Make sure you take that implementation seriously. Integrate your plan into the day-to-day operation of your business.

3. Educate your managers to the strategic planning process. Make sure they all understand the definition, and the importance, of terms - like, "mission" and "objective." And make sure they all understand the critical role they play in both strategy development and strategy implementation.

4. Involve employees beyond those on your planning team. Ask them for help. Have them participate in pre-planning surveys to "bubble up" issues for discussion at your up-coming strategy sessions. And be sure to offer them feedback on the outcome of those sessions. Remember, asking for their input implies a promise to feed back. If you forget that feedback, they'll feel cheated.

5. Gather applicable information prior to your strategy sessions. Have your planning team think through the issues you'll likely discuss at your up-coming strategy sessions - and decide on the information they'll need to deal with those issues and arrive at strategic decisions. Then, prior to your strategy sessions, gather and share that information among the members of your planning team.

6. Hold your strategy sessions away from your office. Avoid the interruptions and distractions which so often arise when planning team members' offices are "just down the hall." It's too easy to step down the hall to check a message, and return much, much later. Don't fall victim. Meet "off campus."

7. Allow enough time for your strategy sessions. Strategic thinking involves thoughtful discussion. This simply takes time. Those who rush, end up with an inferior plan.

8. Encourage open communication. If you're the boss, you'll play the most difficult role in the process. For you'll walk the fine line between being an active participant and coming across as "too strong." As the boss, you're in a position of leadership. Others will simply hear your voice as a bit more loud than any of the others. Tone it down a bit and encourage others to participate.

9. Communicate your strategy. Once you've developed your strategic plan, let your employees know of your strategy. After all, it is they who will help with its implementation. And don't just tell 'em once. Tell 'em again. And again.

10. Keep your plan alive. Have your employees develop specific action steps (tactics) to implement your strategy. Monitor progress of those action steps at quarterly review meetings. Remember, it's one thing to develop a strategy, and quite another to implement it. This is real work! You'll need to manage it as such.

11. Link your strategic plan to your budgeting process. As part of your action plan development (see #10, above), estimate the resources required to accomplish all of the action steps - thus implement the strategy. Those resources should include: people, money, facilities and equipment. These estimates feed nicely into the budgeting process. So your budgeting cycle should (ideally) follow your strategy development and your action plan development.

Seven Tips for Successful Strategic Planning by Ron Robinson, President of ABARIS Consulting Inc. rrobinson@abarisconsulting.com

Tip #1

Develop specific, measurable, achievable, realistic and time-limited objectives that cover the time horizon of your strategic plan. For example, "Increase gross revenue from all sources by 27% by May 30th 2005".

Tip #2

Produce a written plan. This written plan should be short, to the point and outline the decisions made. The written plan is the tool to communicate the decisions made; it is not the end product.

Tip #3

Focus on process and results. The way you develop your strategic plan can have as much to do about your organization's long-term success as the actual strategy itself. Involve key stakeholders either as participants (directly or indirectly) or as information providers.

Tip #4

Focus your strategy on dealing with the key strategic questions first. If you have any burning strategic issues address them first. This frees the participants from wondering throughout the whole process when you're going to deal with the issues and consequently allows them to engage more effectively throughout the whole process.

Tip #5

Implement the plan. Strategy without implementation isn't going to move your organization forward very far, if at all.

Tip #6

When developing your strategic planning process keep in mind the issues you have to deal with, the stage of your organization's development, the amount of information that needs to be gathered and reviewed, the number of stakeholders that need to participate, the organization's strategic competence, (i.e. how well it has done strategic planning in the past) and amount of resources (including time) that can be allocated to the process.

Tip #7

Select the planning horizon for your strategic plan based on your specific needs. There is no magic in 3 to 5 years. Before you select your time horizon give thought to the degree of turbulence within your external environment, degree of turbulence within your organization and the extent to which you anticipate your organization's strategy to change.

Strategic Planning Don'ts (and Do's) CIO Magazine - June 1, 2002

DON'T Start with the Plan

(**DO** Start *Before* the Plan)

DON'T Just Listen Up

(**DO** Listen Down as Well)

DON'T Sweat the Details

(**DO** Allow wiggle room so that the group will be able to change implementation details without rewriting the strategic plan)

DON'T Let It Collect Dust

(**DO** Make Sure the Plan Gets Executed)

DON'T Bronze the Plan

(**DO** Create Flexibility Through Scenario Planning and Frequent Review)

For more information on effective strategic planning, visit

www.doa.louisiana.gov/opb/pub/manageware.htm This site will introduce you to Manageware. Manageware is the state's management manual that describes Louisiana's

integrated processes for policy development, strategic planning, program budgeting, capital budgeting, and performance accountability.