

# CAMPUS LIFE RETREAT

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Strategic Planning Student Health Services

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Executive Director

# Strategic Planning

- **Strategic planning** is an organization's process of defining its strategy, or direction, and making decisions on allocating its resources to pursue this strategy.
  - In order to determine the direction of the organization, it is necessary to understand its current position and the possible avenues through which it can pursue a particular course of action.
- "What do we do?"
- "For whom do we do it?"
- "How do we excel?"
- The process is for determining where an organization is going over the next year or—more typically—3 to 5 years long term.

# Key Components

- The key components of 'strategic planning' include an understanding of the its vision, mission, values and strategies.
- **Vision: outlines what the organization wants to be.** It is a long-term view and concentrates on the future. It can be emotive and is a source of inspiration.
- **Mission:** Defines the fundamental purpose of an organization or an enterprise, succinctly describing **why it exists and what it does to achieve its vision.**
- **Values: Beliefs that are shared among the stakeholders of an organization.** Values drive an organization's culture and priorities and provide a framework in which decisions are made.

# Strategy

- **Strategy:** Strategy, means "the art of the general"
  - - a combination of the ends (**goals**) for which the organization is striving and the means (**policies**) by which it is seeking to get there.
  - A strategy is sometimes called a roadmap - which is the path chosen to plow towards the end vision.

# Process

- Begin with a vision and mission and use them to formulate goals and objectives.
- *Situation-Target-Proposal*
  - **Situation** - evaluate the current situation and how it came about.
  - **Target** - define goals and/or objectives (sometimes called ideal state)
  - **Path / Proposal** - map a possible route to the goals/objectives

# Situational Analysis

- When developing strategies, analysis of the organization and its environment as it is at the moment and how it may develop in the future, is important.
- The analysis has to be executed at an internal level as well as an external level to identify all opportunities and threats of the external environment as well as the strengths and weaknesses of the organizations.

# SWOT

- Among the most widely used tools for strategic planning is SWOT analysis
  - **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats
  - Main objective of this tool is to analyze internal strategic factors, strengths and weaknesses attributed to the organization, and external factors beyond control of the organization such as opportunities and threats.

# External Environment

- Analysis of the external environment normally focuses on the customer.
  - Student
  - Parents
  - Faculty
  - Staff
  - Administration
  - Community

# Goal and Goal sequencing

- Strategic planning and decision processes should end with objectives and a roadmap of ways to achieve them.
- Approach recommends having short-term goals, medium-term goals, and long-term goals.
  - In this model, one can expect to attain short-term goals fairly easily: they stand just slightly above one's reach. At the other extreme, long-term goals appear very difficult, almost impossible to attain.
    - Strategic management jargon sometimes refers to "Big Hairy Audacious Goals" (BHAGs)

# I. Problem and Opportunity Recognition

## A. The Mission Statement

- a. What programs and services should we be providing?
- b. Why do we exist?
- c. How are we unique?
- d. Who are our customers/users?
- e. What are the three to five most important programs we provide, now and in the future?
- f. What do we do best, now and in the future?
- g. How are we different from the way we were three to five years ago?
- h. How are we most likely to be different three to five years from now?
- i. What are our major concerns and how can we measure them?

# Identification of future challenges and opportunities

- 1. What is the source of the challenges and opportunities to your organization?
- 2. Why do these challenges and opportunities exist?

## II. Identification of Parties

A. Who is creating problems, challenges, and opportunities for our organization?

- 1. What internal groups or parties are involved?
- 2. What is their perspective?
- 3. How will these parties affect our mission?
- 4. What external groups or parties are involved?
- 5. What is their perspective?
- 6. How will these parties affect our mission?

# III. Situational Analysis

## A. Organization Strengths, Weaknesses, Opportunities and Threats

- 1. Strengths
  - 2. Weaknesses
  - 3. Opportunities
  - 4. Threats
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- B. Identifying desired goals

# Strategy Formulation

- A. Defining and Accomplishing Success
  - A. 12-Month Goals
  - B. 3-Year Goals
  - C. 5-Year Goals

**Our Mission: To provide high quality services which promote physical and emotional well being, focused on the diverse needs of students.**

**PHASES:**

**PLANNING**

**GATHER INPUT AND IDENTIFY KEY STRATEGIC ISSUES**

**DEVELOP STRATEGIES, GOALS, OBJECTIVES**

**PLAN IMPLEMENTATION**

**STEPS:**

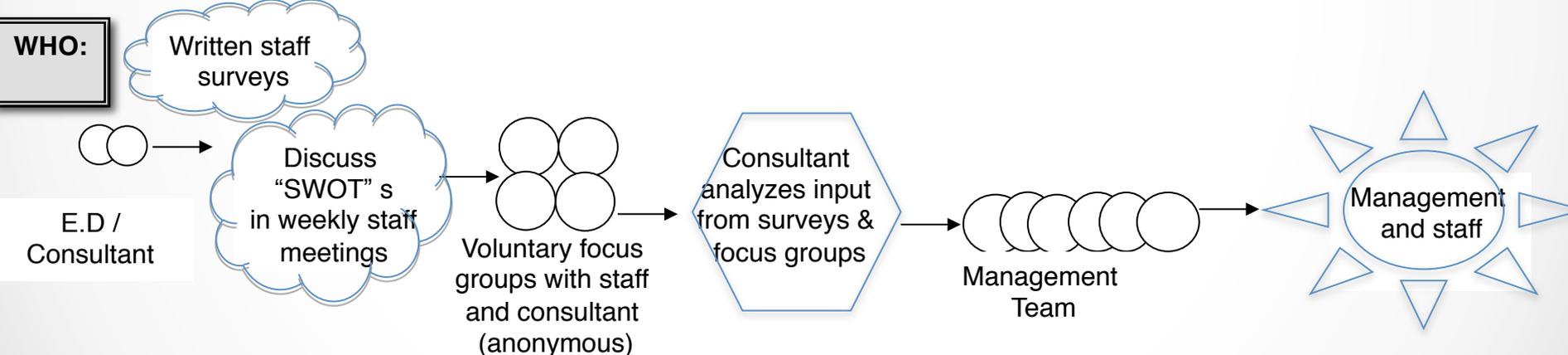
**Define:**  
 •Overall goal.  
 •Steps.  
 •Process: who, what, when.

**Identify:**  
 •Internal strengths and weaknesses. (SW)  
 •External opportunities and threats. (OT)  
 •Begin to discuss key strategic issues we need to deal with, in order to fulfill our mission.

•Review input and identify key strategic issues.  
 •Revisit and revise mission if necessary.  
 •Identify how to address strategic issues (goals, strategies, objectives)

**Develop:**  
 •Action plans.  
 •Format for evaluation and continuous learning.

**WHO:**



**WHEN:**



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# Mission

## Our Mission

- The UCSC Student Health Services mission is to provide **high quality** services which promote physical and emotional well being focused on the diverse needs of students.

## Our Vision

- We strive to create a caring and supportive environment to assist students in improving their physical and emotional well being to aid in their academic success.

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# Our Values

- We value respect, teamwork and communication.
  - **Respect**  
*We respect the dignity, diversity and individuality of all. This drives our effort to develop an inclusive multi-cultural community in which differences are respected and valued.*
  - **Teamwork**  
*Student Health Services staff work as a team with the University, community and students - valuing our varied roles and responsibilities - striving for individual and collective excellence in the services we provide.*
  - **Communication**  
*We value clear, respectful, compassionate communication - as individuals and team members responsibly contribute toward the creation of a healthy and safe environment for all.*

WE CARE

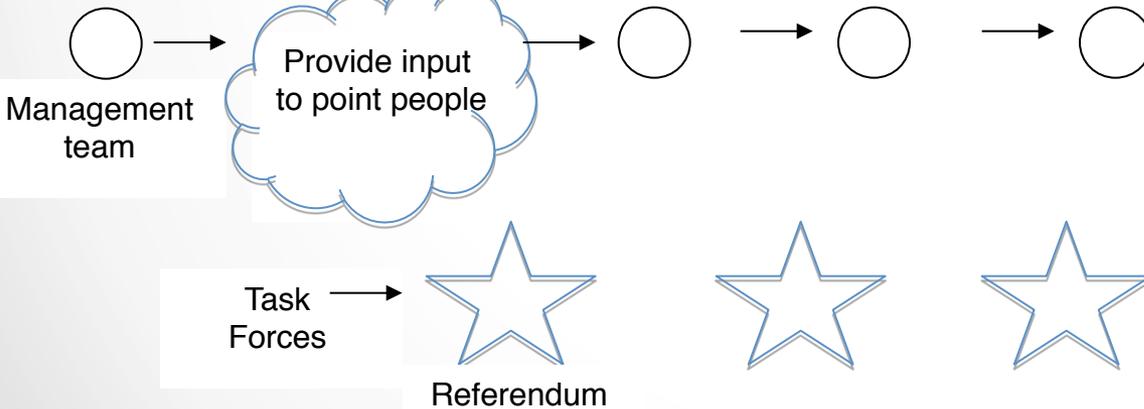
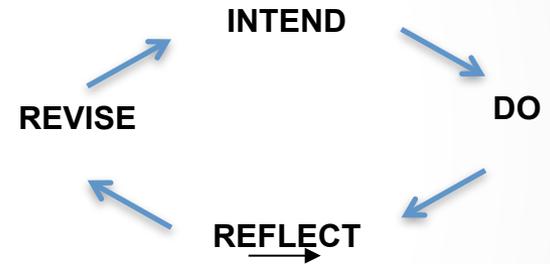
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**DEVELOP ACTION PLANS FOR IMPLEMENTATION AND EVALUATION**

**IMPLEMENT TO ACHIEVE GOALS, WITH PERIODIC EVALUATIVE CHECKPOINTS**

- Incorporate staff input
- Establish priorities and timelines
- Identify task forces

•Finalize plan



**FALL QUARTER**

**WINTER QUARTER**

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# The Plan

- Four main goal areas:
  - Relationship with external environment
  - Communication
  - Service delivery
  - Marketing
- Each area:
  - Challenges
  - Strengths
  - Goals
  - Timeline

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# Relationship with the external environment

When asked “what do you see as the most challenging outside issues that you face?”

- Three issues stood out.
- They were mentioned by
  - 30% of survey respondents
  - All 4 focus groups
  - Management team

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Budget Cuts and  
Constraints

Insurance and  
HealthCare Reform

Dealing with  
UCOP Bureaucracy

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# Budget Cuts and Constraints

- Staff survey:
  - “We’re being asked to do more with limited resources. We’re expected to care for everyone and their diverse needs, like providing care for students with chronic issues who are non compliant.”
  - “Lack of funding in the system means inadequate staffing and resources.”
- Manager survey:
  - “We’ve had to deal with multiple years of draconian state budget cuts and mandates from UCOP.”

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# Insurance and HealthCare Reform

- Staff survey: “The future role of the SHC in relationship to the health care system at large is an unknown, and this makes long range planning difficult.”
- “Parents lack of understanding about UC SHIP and the benefits of it.” Many students have Kaiser and that can be a major problem when they don’t have cars.”
- Manager: “A large source of our fees are tied to our insurance plan. Will the ACA exchanges possibly erode our revenue base?” “Will UC SHIP survive?” “Parents think were just trying to make money off of the UC insurance rather than trying to help care for the students.”

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# Dealing with UCOP Bureaucracy

- Management quotes:
  - “It’s hard to overstate the devastating impact that dealing with UCOP had on morale. And we managers were the messengers.”
  - “It was like this external superpower that came in. We were asked to undo things we’d thoughtfully and carefully done.”
- Staff survey quotes:
  - “We’ve had a loss of autonomy to the center as a whole...more time spent micromanaging the system than managing patients.”
  - “Working with such a big system can lead staff and leadership to believe that they can’t change anything. Sustaining current practice takes priority over implementation of new practices.”

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# Budget Goals

- Become financially self-sufficient
- Sponsor a referendum for a mandated health fee
- Explore outside revenue sources
- Create venues to educate/encourage students/families to choose UC SHIP or CruzCare
- Educate/inform staff about budget

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# Insurance Goals

- Provide access to high quality services for all UCSC students
- Develop MOU with Kaiser to cover the cost of our providing care for their members
- Create venues to educate and inform the campus community about ACA
- Explore billing for more services (CAPS +)
- Develop contingency plan to replace UC SHIP if needed
- Address a new pharmacy financial model

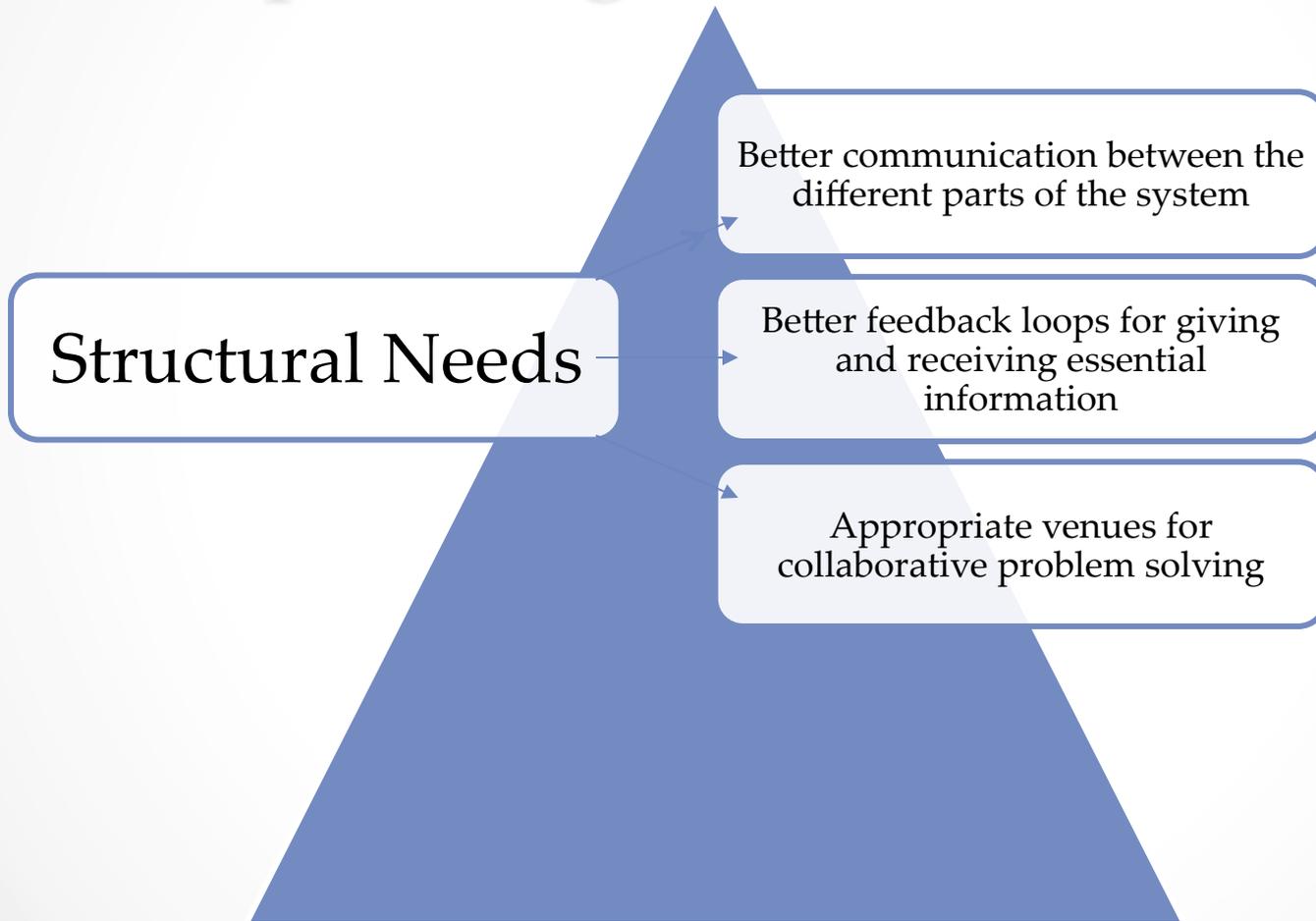
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# UCOP Goals

- Develop and maintain an effective, active and collaborative relationships with UCOP and the campus in order to achieve our mission
- Submit proposals to address challenges with UCOP
- Share best practices with staff and other UC SHS'
- Share successes with staff

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# Improving Communication:



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# Integration Goals

- Achieve a higher level of integration within SHS: SHC, CAPS, SHOP, and Administrative Units
- Open channels for easier communication of clinical information between primary care and CAPS
- Ensure all SHS staff are informed and understand about SHS services, issues and opportunities for development
- Create opportunities for staff from different areas to get to know each other

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# Communication Goals:

## Communicate essential information to SHS staff

- Create structure for interactive feedback
  - Encourage suggestions for improvement and ensure feedback is given about decisions, check for understanding
  - Support managers/supervisors in providing frequent feedback and check for understanding
  - Create and organize regular educational forums for staff in addition to regular staff meetings
  - Develop measures of success and share results/data with staff
  - Implement new venues for communication: new meeting time, days, structure, membership

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# Motivation Goals

- Cultivate strategies to increase positivity in the work environment and to foster mutual respect
- Reinforcing positive behavior and successes
- Modeling positivity
- Monitor staff work satisfaction

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# Service Delivery Goals

- Maintain accreditation with AAAHC, COLA, IACS, APA.
- Conduct internal audits using latest accreditation criteria during the summer of 2014 to assure compliance & successful accreditation.

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# Service Delivery Goals

- Promote seamless integration of all units within SHS
- Improve communication between CAPS and SHC

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# Service Delivery Goals

- Explore achieving accreditation as **primary care medical home**
- Convene committee Dec 2013 to review requirements and implementation strategy to achieve by 2015 with majority of work occurring in summer 2014.

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# Service Delivery Goals

- Investigate expansion of services to faculty and staff
- Continue current flu shot clinics for staff and faculty Fall quarter 2013.
- Consider pros and cons of expansion of immunization services to faculty and staff.
- Consider pros and cons of expansion of new student optometry clinic to faculty and staff 2014.
- Consider pros and cons of expansion of pharmacy services to faculty and staff.

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# Service Delivery Goals

- Improve services to higher risk students. Targeted outreach to higher risk students
- Improve high risk students' awareness of SHS services and educate on use of CruzCare and UC SHIP

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# Service Delivery Goals

- Continue grant-related services currently offered by CAPS once grant ends 2014
- Explore methods for continuation of grant-related services currently offered by CAPS once grant ends 2014

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# Marketing Goals

- Explore ways to find out what services people want
- Develop a comprehensive social media plan
- Create and maintain an online presence
- Develop and refine a comprehensive survey to solicit feedback on services that SHS should be offering

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# Marketing Goals

- Develop support services to implement technology for marketing and education.
- Hire new internal IT staff

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# Marketing Goals

- Educate campus and community more about prevention and about our current SHS services
- Increase targeted traffic and sales
- Brand Student Health Services as high quality experts of care
- Increase online visibility.
- Develop and use social media to manage reputation

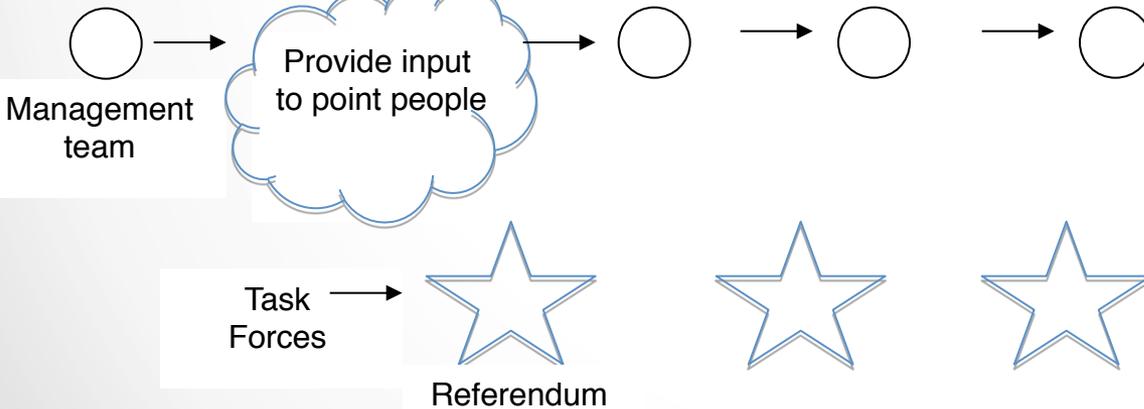
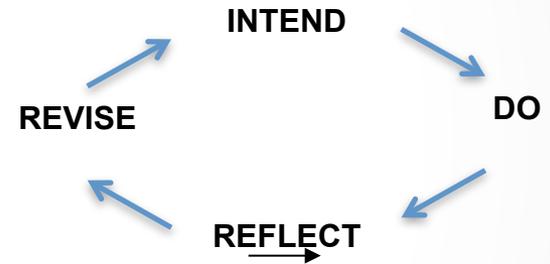
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