Strategic Plan Review
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Definition and guidance to practice within an organization is an overarching theme that needs to be well thought out and developed. Strategic planning can help express the goals and outline the framework that is needed to reach those goals. In the following narrative, strategic planning will be explored by looking at four distinctly different articles that explore strategic planning in various ways. Taking this new knowledge, as well as personal reflection and other resources, important concepts of strategic planning will be applied to a specific case and personal practices.

Annotated Bibliography

Cummings, T. G. (2006). [Review of the book *Execution: The discipline of getting things done*, by L. Bossidy, R. Charan, & C. Burck]. *Academy of Management Perspectives*, *20*(1), 129-132. http://dx.doi.org/10.5465/AMP.2006.1987

> This article was a review of a book, *Execution: The Discipline of Getting Things Done.* It highlights the book's call to action and focuses on the difference between what a company may want and what they are able to achieve successfully. The three main pillars of closing the gap between what is attempted and what is accomplished are listed as leadership, culture change, and people placement.
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> The reviewer also describes several of the shortfalls of the book, such as conflicting information as well as a lack of information regarding the implementation of needed leadership changes. The review is informative and piques a reader's interest in the book itself. It captured the essence of the book in a short amount of space, while also providing the pros and cons of the book. Even without reading the entire book itself, this review gave enough information to further research how changes might be made to increase productivity. The reviewer was not biased and included the perceived faults of the book. This is a high quality, relevant review of a book that could be used by various industries to increase execution of strategic planning.

Drenkard, K. (2012). Strategy as solution: Developing a nursing strategic plan. *The Journal of Nursing Administration*, *42*(5), 242-243. http://dx.doi.org/10.1097/NNA. 0b013e318252efef

> This article helps to define what a strategic plan is and how leaders can begin to assess where their needs are and how to reach them. The article talks broadly about evaluating where the organization is currently, where the organization would like to be in the future, and helps define an action plan to reach specific goals. The writer poses some probing questions for readers to think about in their individual organizations regarding engagement and integration of research in specific facilities.

Another point made by the writer is to ensure that the bedside nurse is involved in advancing the science of nursing. This is a thought-provoking piece that advances both knowledge and further curiosity regarding strategic planning, and what it can mean for nurses within their practice. This article is very relevant for nursing leadership and gives a short but concise summary of a strategic plan. However, to execute and implement a strategic plan, this article would not provide enough information on how to structure or formulate one, which was a shortfall.

Evans, C.J., Shackell, E.F., Kerr-Wilson, S.J., Doyle, G.J., McCutcheon, J.A., & Budz, B. (2014). A faculty created strategic plan for excellence in nursing education. *International Journal of Nursing Education Scholarship, 11*(1), 1-11. http://dx.doi.org/10.1515/ijnes-2013-0066

This article sought to develop a meaningful strategic plan to create a future-focused Bachelor of Science Nursing (BSN) program. The authors provided a literature review on strategic planning and what is essential. From that, the authors noted beneficial techniques to develop a strategic plan so that it fits the vision and needs unique to theirs.

In their literature review, the authors identified the intentions of a strategic plan and discussed various approaches to strategic planning, including conventional, innovative, and non-traditional. The more recent methods of strategic planning and organizational change, particularly in healthcare, found that a collaborative approach that involves multiple stakeholders was key. The authors established that it is imperative to use faculty expertise and values along with a predetermined framework directed by administrators or consultants.

The authors selected two phases to carry out the strategic process and Phase One, tasked with developing the strategic plan, was discussed. They aligned the philosophy of the School of Health Sciences with their work and emphasized respect and engagement of faculty within the planning process. A strengths, weaknesses, opportunities, and threats (SWOT) analysis was used to evaluate internal and external factors and assist with finding new options using a collaborative approach. Success factors resulted, laying the foundation to create strategic objectives, along with a vision and values for the strategic plan.

Falk, N. L., Garrison, Jr., K. F., Brown, M., Pintz, C., & Bocchino, J. (2015). Strategic planning and doctor of nursing practice education: Developing today's and tomorrow's leaders. *Nursing Economic$, 33*(5), 246-254. Retrieved from https://web-b-ebscohost-com.ezproxy.umary.edu/ehost/pdfviewer/pdfviewer?vid=22&sid=94a939b1-3565-41b1-8851-555d5ed71a06%40pdc-v-sessmgr01

The authors, researchers, and faculty at George Washington University found little evidence describing how to approach strategic planning education within graduate programs and discussed and reflected on their experience and techniques of teaching strategic planning to DNP students that will guide the integration of

essential content into those programs. Discussion includes components of required coursework and teaching strategies of the "Health Enterprise" course early in the program to acquaint and reinforce strategic planning skills to DNP students that will benefit their understanding and development of these critical skills throughout the course, degree path and career implementation.

They noted the use of Bloom's Taxonomy to guide instructors with assisting students in achieving six cognitive levels of strategic thinking and planning, who enter with various levels of experience and familiarity of the strategic planning process. Relevant reflections by the authors are offered on class teaching and of student growth witnessed as the course progresses, as well as perspectives of how it has impacted their own and students' careers to engage in decision making with stakeholders and practice to the full extent of their education and training. The article is useful and due to the vast experience of the authors, relevant to advancing dissemination of information about the importance of educating nurses on strategic planning.

Strategic Planning Case Study

What lessons are learned from reviewing the strategic plan and progress made in XYZ HS?

A key to strategic planning is developing a strong vision and understanding the values to incorporate. Within the strategic plan of XYZ HS, a vision was identified and embraced by the nurse leaders, thus leading to commitment. The intent of a strategic plan is to align the vision and mission of an organization with its objectives and initiatives (Evans et al., 2014).

The organization developed its plan by splitting the nurse leaders into three smaller workgroups for the purpose of focus. Each was tasked with proposing 3-5 strategic goals guided by the vision. This was similar to the process Evans et al. (2014) chose to use, as two groups carried out a SWOT analysis focused on having an understanding of the vision and incorporating values. In both examples, focus allowed for the appropriate selection and prioritization of strategic goals through collaboration.

Lastly, commitment and accountability of those involved is another lesson. To execute each strategic priority, a commitment must be made by each member of the team, and each held accountable. Active participation by leaders is imperative along with stressing the importance of the plan and what is necessary by each member in achieving it (Cummings, 2006).

What factors were most significant in driving 47 diverse hospital nurse leaders towards a common vision and strategic priorities?

XYZ HS needed to have a shared mission and common values to be able to be effective. Both Drenkard (2012) and Evans et al. (2014) described the planning process of strategic planning as having a foundation built upon a vision and mission of where an organization wants to see itself. The large number of staff members required that they have a common theme and goals to be working toward that could be consistent among the entire health system. Furthermore, with the implementation of the Patient Protection and Affordable Care Act, healthcare leaders needed to reexamine how they could be successful in managing a healthcare system of this size. This required them to structure their vision and strategic priorities differently. The pace of the healthcare industry is also rapid, requiring them to also have a commonality in

their vision to provide comprehensive, collaborative strategies in the changes that they would be making. As Evans et al. (2014) wrote of strategic planning within healthcare, creating one that is future-focused and accountable to students, educators, patients, families, and communities requires being able to keep with the pace of healthcare trends as they evolve.

How do size and scope help and/or hinder strategic success?

The size of this large healthcare system (noted as 56,000 full-time equivalent employees) is both an asset and a liability. The diversity and varied backgrounds in this large of a group can yield many diverse ideas when brainstorming. Member backgrounds can bring many philosophies to light and may have different angles that can be seen from the group. However, with a group this large, a consensus of all may be hard to reach and there may be dissension among group members that feel slighted. Also, as noted by Gallupe, Bastianutti, and Cooper (1991) groups of a large size can fall victim to the phenomenon referred to as "social loafing" in which group members do not work as hard in the group as they would alone. With an organization such as XYZ HS, the larger group working on a system-wide problem could pose problems of social loafing, thus a hindrance. Additionally, time constraints pose hindrance as much more is needed for each group member to trust one another. Evans et al. (2014) identified that within the co-creative process, trust among one another must be established, and the time necessary to build that trust may not be sufficient.

Of the key steps articulated, which do you think was most important?

The key step of focus is the most important one within this process. As stated in the case study, the need for focus cannot be understated (Roussell, Thomas, & Harris, 2020). A plan is formulated with awareness, or what Roussell et al. (2020) delineated as appreciative inquiry, to serve as a framework and drive needed change and focus, which aids in identifying and prioritizing what is most important. XYZ HS's nurse leaders' embracement of a vision of healthcare that is fair, safe, humane, and cost-efficient spurred commitment to a system-wide strategic planning focus on change that needed to take place in the organization and allowed XYZ HS to utilize their nurse leaders to work together to identify strategic goals important to unite the organizational mission of the 47 diverse hospitals across 10 states (Roussell et al., 2020). Through the nurse leaders' commitment, nine to 15 proposed strategic goals were put forth to the group for a vote.

Are there any other steps that you would advise employing in this process?

An important part of strategic priorities is staff engagement. According to Roussel et al. (2020), a lack of staff engagement in strategy formation is one of the primary reasons that an organization's strategic outcomes are unattainable. Evans et al. (2014) further added that success is dependent upon ensuring that a collaborative approach is used, involving multiple stakeholders. XYZ HS's large size, various geographic locations, and employee diversity could pose a threat to unify with a consistent way of operating and delivering care. The case study discusses the nurse leaders' engagement and commitment to the change process; however, staff engagement in such a diverse, large organization is important to consider. Stakeholders, including all organizational staff, must commit to the proposed change prior to taking action to help affect change.

Furthermore, it is important to have a clear understanding of the environment and what possibly drives it. Environmental scanning can be of benefit, and a tool such as a SWOT

analysis: **s**trengths, **w**eaknesses, **o**pportunities, and **t**hreats, can also assist with understanding areas of influencing forces. Additionally, it allows for the opportunity to assess both external and internal conditions to empower participants and use a collaborative approach were needed to ensure success (Evans et al., 2014).

Application

What is the purpose and components of a strategic plan?

The purpose of a strategic plan is to inspire and create a vision of an organization's plans for the future and goals that they will work toward (Roussel et al., 2020). The plan should include an assessment of current organizational priorities as well as a vision of where the organization will aim to be in the future. The strategic plan becomes a "map" of the organizational goals and desired outcomes and can inspire those whose efforts will be required to meet these goals (Drenkard, 2012). Gathering the interdisciplinary team together to coordinate the focus and combine ideas is beneficial when creating this map.

Components required for a strategic plan include strategic goals and priorities, desired outcomes, and objectives (Roussel et al., 2020). Components of a strategic plan can differ slightly based on needs, however, some things are consistently beneficial. Finding a common vision for the organization or department and then moving into investigating and becoming aware of current nursing practice are important initial steps (Drenkard, 2012).

Next, according to Drenkard (2012), finding where the missing pieces of information are move the strategic plan along a disciplined, linear process. Goals should be set outlining what the organization would like to achieve, such as improved patient satisfaction, or reduced hospital-acquired infection rates. Outcomes, then, will be assessed in order to define success or failure and including both short-term and long-term outcome criteria is useful in a strategic plan (Roussel et al., 2020). Lastly, objectives are the measurable marks in which action can be taken on to move towards meeting the goals that were set forth in the strategic plan. Objectives should be actionable, measurable, timely, and realistic in order to be effective (Roussel et al., 2020). The strategic plan should attempt to be all encompassing of involved team members with the goal of input from all areas to increase buy-in during implementation (Evans et al., 2014).

Through the use of the references utilized for the annotated bibliography to support your thoughts, discuss how you have witnessed/participated in this level of healthcare strategic planning. (if you have not had experience with this form of planning, what insight have you gained from this case study and supporting resources that could support your organization in the event of a change in their strategic plan?)

Our group has not had experience with this level of healthcare strategic planning, however, we all have gained insight into supporting an organizational strategic planning change. Drenkard (2012) guides the process of facilitating necessary organizational change through engaging the bedside staff for ideas of concerns for needed change which can lay the ground-work for researchable questions. The case study of XYZ HS illustrates that change is a long process necessitating commitment, focus and fortitude for meaningful, lasting change to occur. Introducing and educating nursing students at all levels of strategic thinking and planning to be prepared to enter the workforce ready to both lead and support change in the organizations where they work is an important focus for nurse educators (Falk et al., 2015). We have also

gained insight on the different approaches to strategic planning and the importance of utilizing tools such as the SWOT analysis to guide organizational change (Evans et al., 2014).

Thinking back to what we have studied so far in this class, how does Complex Adaptive Systems play into successful strategic planning? Do functions of system's thinking, shared governance, clinical/nursing informatics support the endeavor of strategic planning? What challenges, barriers, or even unforeseen opportunities may result from with strategic planning?

Today's healthcare is a complicated system that complex adaptive systems (CAS) aid leaders in managing. Strategic planning that is future-focused within nursing requires that the complex, evolving system of healthcare is understood and incorporated into the plan, like keeping on track with the trends in healthcare and considering the changing scope of practice within nursing (Evans et al., 2014). A CAS can contribute to strategic planning as this type of system produces an environment that encourages active listening, builds positive relationships and partnerships, and allows for creativity and innovation to flow, all of which help support change (Roussel et al., 2020). All of these components are necessary to help an organization remain dynamic and competitive, as does a strategic plan (Evans et al., 2014). Drenkard (2012) further supported this showing how envisioning the future in the strategic planning process allows for the development of what is needed to achieve that future, which will include wanting to be competitive and dynamic among the other organizations.

Complex adaptive systems also allow for all healthcare professionals to influence being able to deliver exceptional patient care and nurse leaders are pivotal to that (Roussel et al., 2020). This correlates with what is necessary within a strategic plan. As Cummings (2006) explained, active participation by leaders is key within strategic planning, along with having leaders stress to others the importance of it and each team member's part in achieving it. Furthermore, Roussel et al. (2020) included that shared decision making and partnerships among not only one another but as well as leaders and staff are key components within CAS. This can be achieved through shared governance structures, nursing councils, providing information and ensuring it is shared among staff, and staff engaging in activities that improve performance (Roussel et al., 2020).

These same methods of active participation and engagement by staff can greatly benefit strategic planning. Evans et al. (2014) identified that Pink's motivation theory, built upon the three elements of autonomy, mastery, and purpose, should be used within an organization to help achieve results and engage employees. Using autonomy allows others to decide what tasks to be involved in and how to accomplish the tasks, while mastery is the desire to further improve upon something that matters (Evans et al., 2014). Lastly, when a participant understands how they can contribute to the purpose and vision, they will want to contribute to a purpose greater than themselves (Evans et al., 2014). Having activities for individuals to participate in, such as shared governance and unit based councils, allows activation of the motivation theory within an organization, which will further engage staff, achieving more success with strategic planning.

One of the biggest barriers or challenges within strategic planning is engagement and participation. Nurse leaders, especially need to be active participants. If they do not, it will be more difficult to carry out the strategic planning process and execution (Rousell et al., 2020). In the planning process of the BSN program example, the authors cited that while faculty showed interest, attendance of the meetings held was poor due to schedules, which hindered input into the process (Evans et al., 2014). As Rousell et al. (2020) mentioned, there must be the presence

of the belief that the changes that will occur will be of benefit, and to achieve that much thought and discussion must occur. Additionally, a commitment by those who agreed to be a part of the process needs to be exhibited by actively participating and doing the work necessary (Rousell et al., 2020). With nurse leaders, or in the example of the BSN program, faculty, it is necessary for there to be both the commitment and willingness to follow through so that proper engagement and communication occur.

Another barrier to strategic planning is execution. If poor execution of the plan occurs, a gap also occurs, preventing the implementation of strategies, which in turn makes an organization less competitive, opens them to more mistakes, and causes change and improvement to slow overall (Cummings, 2006). Rousell et al. (2020) wrote that those involved in the strategic process must "engage their hearts in the change" (p. 149). Likewise, with execution, "leaders need to be "deeply and passionately" involved in execution; they must put their "heart and soul" into making things happen" (Cummings, 2006, p. 130). The plan itself may be really good, but if the execution of it fails, the plan does as well.

Lastly, communication and social process can pose a challenge. Like with many tasks, projects, and strategies, if communication fails, outcomes fail. With strategic planning, forming the plan and executing it requires the occurrence of a social process (Cummings, 2006). When interaction among those taking part in strategic planning is passive, superficial, and guarded, other areas fail, such as commitment and accountability (Cummings, 2006). However, when openness, informality, candor and effective close happens, or what is identified as "robust dialog," the process will be of high-quality and allow for effective gathering and analyzing of information (Cummings, 2006). Cummings (2006) adds that this will form credible commitments that are followed through. Working together and communicating will allow for an impactful strategic plan and execution of it.

Conclusion

Multiple components are necessary for the strategic planning process to occur successfully and to be implemented well. The review of four different articles provided oversight for carrying out the strategic planning process using various methods, but the concepts and the main themes within each of those were similar. Engagement by the stakeholders is one of the keys to it, as well as having a strong vision of where the organization wants to be. Furthermore, those involved in the process must be open and committed to the process as well as the changes the organization hopes will result. Each of these keys was identified in the case study of XYZ HS, showing how proper planning of a strategic process allows for positive outcomes that fit the vision, mission, and goals of an organization. Variations can occur within a strategic plan as long as fundamental factors are included.

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