TRANSITIONING TO A CPD ORGANIZATION THROUGH A HYBRID STRATEGIC PLANNING METHODOLOGY

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METHOD MAPPING THE MATRIX MAP GOALS AND OVERALL MISSION **DEFINE STRATEGIC IMPERATIVES FUTURE DIRECTIONS** BACKGROUND Two axes: mission impact and financial/profitability Utilized Survey Monkey Identify revenue and investment strategies Formulate three key areas that will guide The hybrid strategic planning methodology The Annenberg Center for Health Sciences was organizational growth Likert scale survey Determine value proposition, customer relations **Answers Questions:** positions the organization to continuously founded in 1980 by U.S. Ambassador Walter H. and image Open-ended comments evaluate its strategic imperatives, building on How do activities contribute to financial sustainability Annenberg with a dual mission: to meet the Define areas the organization must excel and mission impact? Adoption of new mission its successes, eliminating those that do not educational needs of local clinicians at Establish core competencies and continuous What actions might we take to move forward within work, and course correcting when necessary. Eisenhower Medical Center and the Coachella improvement strategies our strategic plan? It is action-oriented and identifies everyone in Valley, as well as national and international the organization as an owner of the strategy clinicians; and to serve as a convener for and its successes. discourse on current issues in health care delivery and policy. In 2014-15, the Annenberg Center's Board of Directors determined to undertake a strategic planning process to REFERENCES **ACTION ITEMS** reimagine the organization's mission and strat-**OPPORTUNITIES WEAKNESSES** Kaplan, Robert S., and David P. Norris. egy by aligning the organization's strategic TACTICS FOR Balanced Scorecard, Boston: Harvard Business initiative into operational terms for continuous TIME LINES **OBJECTIVES** Review Press, 1996. improvement in current and future health care Kaplan, Robert S., and David P. Norris. Strategy delivery environments. **THREATS** Focused Organizations. Boston: Harvard STRENGTHS Business Review Press, 2000. GOALS & **SWOT TACTICAL** Kaplan, Robert S., and David P. Norris. Strategy **OBJECTIVES ANALYSIS** Maps. Boston: Harvard Business Review Press, **PLAN PURPOSE** BOARD & LEADERSHIP TEAM A need emerged to engage our learners more Masaoka, Jan, Steve Zimmerman, and Jean fully from a traditional CME focus to a CPD Bell. Nonprofit Sustainability: Making Strategic BOARD & STAFF LEADERSHIP & STAFF Decisions for Financial Viability. San Francisco: clinical and practice focus so that their Jossey-Bass, 2010. participation in our activities reinforces their continuous professional development. This Seiler, Timothy, *Developing Your Case for* BOARD & LEADERSHIP TEAM adaptive approach to serving our learners BOARD & STAFF BOARD & STAFF LEADERSHIP TEAM Support. San Francisco: Jossey-Bass, 2001. demands new tools, which inevitably requires new technology. Finally, the Annenberg THREE LEGS OF Center's history as a convener situates the MISSION **MAPPING REPORTING &** organization as one that facilitates modes of ORGANIZATIONAL **REVIEW EVALUATION** THE STRATEGY discourse on selected health delivery and CHALLENGES STOOL policy challenges. **ASSERTS** MAPPING CONDITIONS LEARNING MONTHLY **DOMINANT** FINANCIAL THROUGH PRIMARY THE MATRIX & GROWTH **VALUE** CME TO CPD CONVENING **ADDRESSES** STATES WHAT **EVALUATION** INTERNAL **CONDITIONS PREVENTING** NEEDS TO BE DONE TO & OUTCOMES CUSTOMER QUARTERLY **PROCESS FULFILLMENT** OVERCOME CONDITIONS **NEW TECHNOLOGY** COMMITTEE OF VALUE **COMPARE PREVIOUS SWOTS GOALS & OBJECTIVES** For each strategic imperative establish three Identify themes KAPLAN goals and three objectives per goal Address weaknesses and threats, as well as strengths and opportunities Classify as primary and secondary themes