

Creating a Nursing Strategic Planning Framework Based on Evidence

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KEYWORDS

- Strategic planning • Evidence-based framework
- Magnet • PPH

Somehow there are organizations that effectively manage change, continuously adapting their bureaucracies, strategies, systems, products, services, and cultures to survive the shocks and prosper from the forces that decimate others...they are the masters of what I call renewal.

Robert H. Waterman, Jr—The Renewal Factor.¹

The twentieth century was ruthless and unforgiving for many industries, including aerospace, airline, banking, and defense. Downsizing, mergers, acquisitions, and closures plagued the United States during that time span. Unfortunately, this trend has continued into the twenty-first century, with the health care industry very much a part of the concomitant chaos. Both public and private health care organizations continue to face a turbulent, a confusing, and an often-threatening environment.¹ The imposed economic constraints of various payor mechanisms, health care legislative and policy initiatives, as well as changing population demographics and advancing technology compel health care organizations to critically analyze their systems and develop strategies aimed at enhancing quality, improving care delivery and service, controlling costs, and increasing market share. According to Swayne and colleagues,¹ positioning an organization to more effectively respond to this changing environment requires focused strategic thinking and planning on the part of the management team as they seek to become “masters of renewal” in this dynamic environment.

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This article describes an evidence-informed strategic planning process and framework used by a California public health care system, representing the full continuum of care on its 5-year strategic planning journey to Magnet Recognition status, involving nurses at all levels of the organization. This article includes (1) an overview of the organization and its strategic planning process, (2) the structure created within nursing for collaborative strategic planning and decision making, (3) the strategic planning framework developed based on the organization's balanced scorecard (BSC) domains and the new Magnet model, (4) the process undertaken to develop the nursing strategic priorities, and (5) the process undertaken for continuous renewal of the strategic planning process. Outcomes associated with the structure, process, and key initiatives are discussed throughout the article.

ORGANIZATIONAL PROFILE

Palomar Pomerado Health (PPH), located in North San Diego County, is the largest public health care district in the state of California, serving an area of 850 square miles encompassing 7 different communities. The health district was founded in 1937 by a registered nurse (RN) and a dietician, who opened a small medical facility on a former poultry farm. Today, the health system comprises the Palomar Medical Center, a 317-bed tertiary medical center and level II trauma center in Escondido, California; the Pomerado Hospital, a 107-bed community hospital in Poway, California; 2 distinct part skilled nursing facilities; a home care division; an ambulatory surgery center; an outpatient behavioral medicine center; a recently opened outpatient women's pavilion; and 2 retail health clinics.

PPH is governed by a 7-membered publicly elected board of directors (BOD), each serving a 4-year term. One chief executive officer oversees the entire health system along with 13 senior level executives who lead the organization and provide a fiscal oversight for its \$1.7 billion operating budget. Two-thirds of PPH's 3800 employees are organized for the purposes of collective bargaining. The California Nurses Association is the recognized bargaining agent for the RNs, and the Caregivers Healthcare Employees Union is the bargaining agent for the service and technical employees. Because PPH is a public entity, all BOD proceedings are open to the public, and all, but very few, documents are made available to the public on request. This level of transparency subjects PPH to frequent public and media scrutiny and presents a unique challenge in the strategic planning process.

Directional Strategies

Swayne and colleagues¹ define directional strategies as the organization's mission, vision, and values. The mission should describe the organization's distinctive purpose, the vision as the hope for its future, and the values as the guiding principles that are held dear by its members.

Mission

PPH leadership believes that its role as the largest public health care district in the state imposes a special level of accountability to the community. This is reflected in the PPH mission: "To heal, comfort and promote health in the communities we serve." This mission is a broadly defined enduring statement of the purpose that distinguishes PPH from other organizations and places nursing at the core of the organization's existence.

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