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Bend the Curve CIP-News - March, 2013

Bend the Curve Continuous Improvement Practitioners

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March 2013

Volume 8 Issue 3

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Special points of interest:

- Next Clinicals
 - April 19
 - May 16
 - June 21



Third Friday: Building a Strategic Plan

When: Friday, March 15, 2013
8:30AM to Noon

Where: Augusta, Maine
Maine DHHS-OQIS

This workshop was a continuation of the *Third Friday* series of special, progressive workshops. It built on the *True North* workshop held last month and enabled participants to understand what comprises an effective strategic plan and to practice developing one.

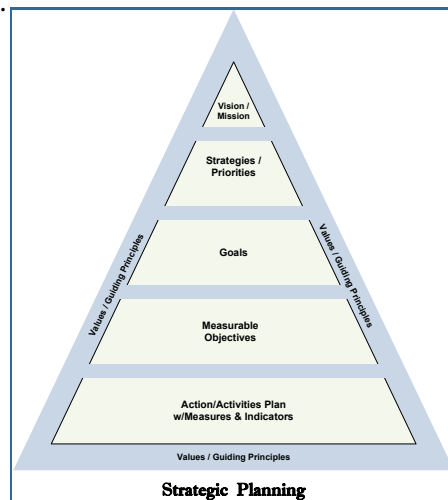
Building Your Strategic Plan

Strategic Planning is the process of defining strategy, or direction, and making decisions on allocating human, fiscal, and other resources to assure that strategies are implemented to drive overall objectives. Development of a strategic plan for use as a guide for measuring progress toward objectives is critical for efficient and effective utilization of resources and meeting the needs of the organization's customers. All staff play important roles in both developing and implementing plans.

This includes identifying a vision; clarifying the mission; determining goals; writing measurable objectives; and developing strategies and action plans designed to reach each objective. Using their own experiences as a learning model, participants developed their own personal or organizational strategic plan. Tools for evaluation to help map direction, such as a SWOT analysis, cost-benefit analysis, and return on investment (ROI) analysis were also demonstrated.

Then, once a strategic plan has been developed, how will you know if you've achieved your goals and objectives?

The *Understanding and Using Measurement & Data* workshop in April and the *Displaying/Presenting Data: When & How* workshop in May will help to not only answer this question but to also inform others in their planning and decision-making.



Bonnie I. Tracy HR Development Consultant Maine DHHS, OCQIS-SETU

Bonnie Tracy is the HR Development Consultant for the Staff Education and Training Unit in the Department of Health and Human Services. She has had prior management experience at KV Cap, a private social services agency, and Human Resources training experience in business, including New Balance. She has worked as a Special Education teacher for Mid-Maine Technical Center, a career and technical education center. Bonnie has a Bachelor's degree in Psychology from Syracuse University, a Master's in Education from the University of Maine at Orono, and an M.B.A. from Thomas College. She has also trained as a Continuous Improvement Practitioner through the State of Maine's *Bend the Curve* program.

Strategic Plan: Comments on Key Learnings

Raymond G. Taylor Maine Dept. of Labor

One of the things that I took away was confirmation of my perception that many strategic plans are created but not followed.

As I noted in the workshop, this seems especially true when the creation of such plans is imposed on an organization from outside (accreditation, for example).

But then that got me to thinking about what are the correlates of “strategic plans that die on the shelf?” The fact that externally required plans often die, suggests that the organizational “structures” or “cultures” that bring them about may be crucial to their survival. Obviously, the greater involvement of persons at all levels advances survivability.

But beyond the obvious, I still wonder about what factors are associated with planning vitality and what factors are associated with planning morbidity.

“Things which matter most must never be at the mercy of things which matter least.”
- Johann Wolfgang von Goethe

David J. Back OpEx & L6S

Bonnie presented a clear and illuminating structure to deploy the vision of an organization to the tasks needed to achieve strategic planning.

Many organizations work on strategic planning but the method shown here provides a simple common language to avoid the excessive frustrations experienced by groups that hinders their collective productivity.

Bonnie’s point that organizations often get mired down in definitions and understanding exactly what is required of the process that they end up doing a poor job pulling the Strategic Plan together is so, so true.....with all of the obvious consequences.

This is an essential tool and proficiency for every organization, although many individuals and organizations believe they do this (well) already - it is not new - it is not glitzy - it involves a change in senior management behavior, etc., etc. Essentially this brings standard work and best practice habits into the strategic planning process.

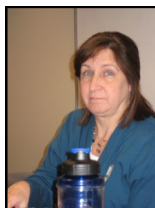
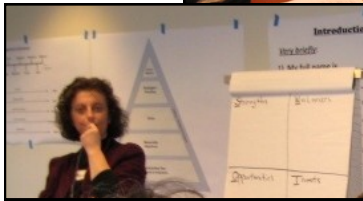
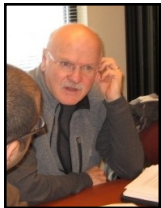
Some consultancies charge far more for far less.

BTC Lean Schedule

Date	Time	Topic	Location	Contact
April 19	8:15-4:30	Clinical Supervision	2 Anthony Avenue	WEL/JK/JR/MD
May 16	8:15-4:30	Clinical Supervision	2 Anthony Avenue	WEL/JK/JR/MD
June 21	8:15-4:30	Clinical Supervision	2 Anthony Avenue	WEL/JK/JR/MD
July 19	8:15-4:30	Clinical Supervision	2 Anthony Avenue	WEL/JK/JR/MD
Aug 16	8:15-4:30	Clinical Supervision	2 Anthony Avenue	WEL/JK/JR/MD
Sept 20	8:15-4:30	Clinical Supervision	2 Anthony Avenue	WEL/JK/JR/MD
Oct 18	8:15-4:30	Clinical Supervision	2 Anthony Avenue	WEL/JK/JR/MD
Nov 15	8:15-4:30	Clinical Supervision	2 Anthony Avenue	WEL/JK/JR/MD
Dec 20	8:15-4:30	Clinical Supervision	2 Anthony Avenue	WEL/JK/JR/MD

* To add or see more events or detail, go to the Bend the Curve Calendar in Outlook's Public Folders.

Photos



Strategic Plan Components

Vision: (The Dream) Outlines what the organization wants to be, or how it wants the world in which it operates to be. It is a long-term view and concentrates on the future. It often is inspirational.

A vision statement is a declaration of where you are headed—your ideal future state, describing a picture of what your organization's future will be and where the organization is headed. At its best, the vision statement should be brief, understandable, and shared with everyone.

Mission: (What & Why) Defines the fundamental purpose of the organization, briefly describing why it exists and what it does to achieve its vision—and for whom. The reason for existing.

Many people mistake the vision statement for the mission statement, and sometimes one is simply used as a longer term version of the other. However, they are different, with the vision being a descriptive picture of a desired future state and the mission being the means of trying to successfully achieve the vision -- applicable now as well as in the future. The mission statement is generally more concrete and action-oriented. For an organization's vision and mission to be effective, they must be known and clearly understood by all staff and must be a part of the organization's culture.

Values/Guiding Principles: Beliefs that are shared among the stakeholders of an organization. Values and guiding principles drive an organization's culture and priorities and provide the framework in which decisions are made. They influence and set the context for everything.

An example might be "Give a man a fish and feed him for a day, but teach him to fish and feed him for life". Such a maxim may, for example, set organizational priorities of self-sufficiency over shelter.

Strategy: (How) Strategy, narrowly defined, 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. Strategies explain how the organization will reach its goals/objectives.

A strategy is sometimes called a roadmap - which is the path chosen to work towards the end vision. The most important part of implementing the strategy is ensuring the organization is going in the right direction towards the end vision.

Goals: Broad statements of policy which typically are ambitious and not necessarily achievable. They provide the direction toward which the organization intends to go.

There can be several goals at the same time. However, they must be congruent – that is, the goals must work well with each other. Is goal A compatible with goal B? Do they fit together to form a unified strategy? Goals should not conflict with each other. The goals of one part of the organization should mesh compatibly with those of other parts. Goals may also be hierarchical – for example, program goals should be able to “nest” in one or more of the organizational goals. Goals may also be short-term goals, medium-term goals, and/or long-term goals. The short-term goals might be realized fairly easily, just slightly out of one's reach. At the other extreme, long-term goals can appear very difficult, almost impossible to attain. (You've probably heard of strategic management's "Big Hairy Audacious Goals" [BHAGs] in this context.) Goals can also be sequenced, with one leading to the next.

Objectives: (How much of What by When) Specific measurable outcomes that can be achieved within a definable amount of time.

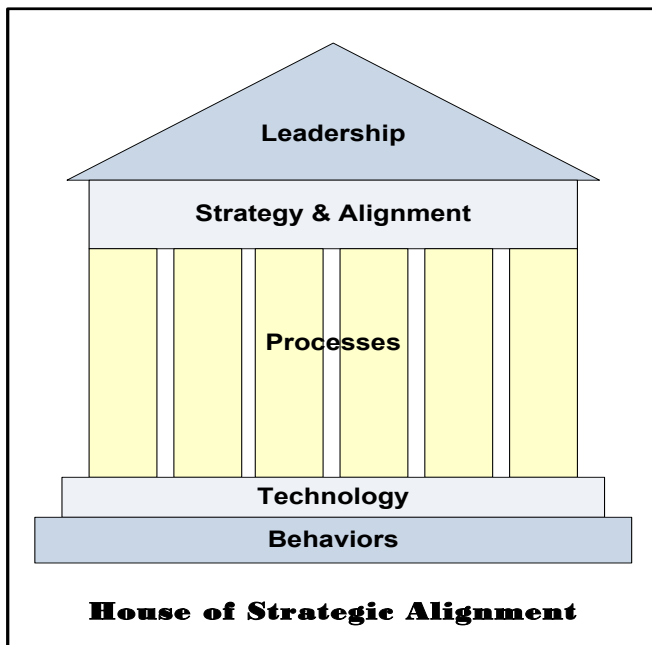
Objectives should be specific, measurable, accountable (transparent & responsive), realistic, and timely. They should be attainable, challenging, meaningful, and simple and clear to understand. They should always be aligned with the organization's goals.

Measures: Quality measures are mechanisms used to assign a quantity to a selected aspect of the service/product by comparison to a criterion, evidence-based that specifies what “quality” is.

Implementation Action Plans: (What will be done & Who will do it by When) An implementation action plan breaks each strategy into specific, defined change actions, assigns each action to one or more responsible people, and estimates when each action will be completed, as well as the actual date of completion. It specifies the measures to be used for each strategy/action in order to know if it has been achieved and/or been successful. It may also identify dependencies, resources required, and potential barriers/constraints for each strategy/action, as well as possible countermeasures.

*Developing an implementation action plan can be a challenging effort for it demands a clear path to be taken in implementing the strategy(ies). If this can't be defined, then the strategy can't be implemented. Moreover, if the implementation of the Plan is not managed well or at all or if the planned actions are not achievable, then the Plan's failure can be predicted-along with the resulting staff cynicism about the process and the value of their role in it. It is critical to understand that **the Action Plan must be a living, dynamic instrument** -- changing, adapting, renewing as the context and process/system change. If the plan becomes a static document, it will, as you know, sit and collect dust on the shelf. As in any project management effort, the Plan can be used to manage the actions/tasks, timelines, and staff.*

Strategic Planning



Adapted from: <http://lean.mit.edu/downloads/lai-educational-network-ednet/view-category.html>

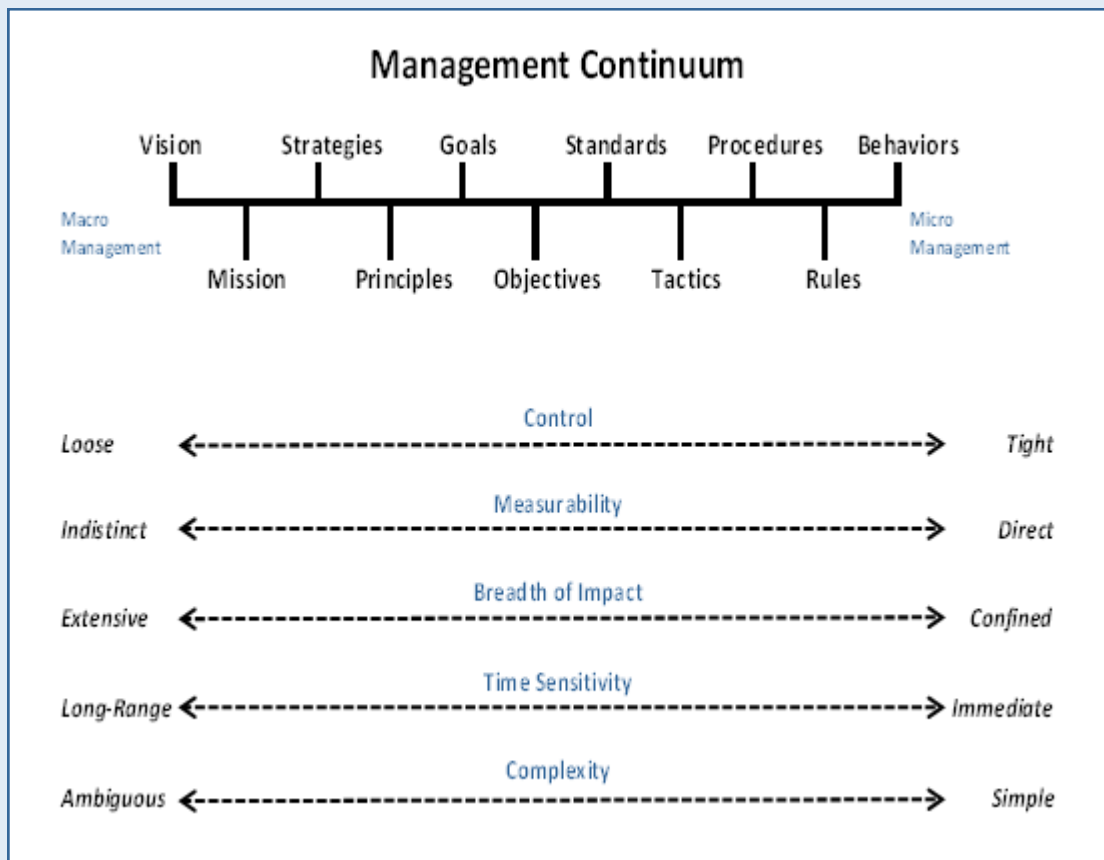
Alice: Would you tell me, please, which way I ought to go from here?
 The Cheshire Cat: That depends a good deal on where you want to get to.
 Alice: I don't much care where.
 The Cheshire Cat: Then it doesn't much matter which way you go.
 Alice: . . . so long as I get somewhere.
 The Cheshire Cat: Oh, you're sure to do that, if only you walk long enough.

Lewis Carroll. Alice's Adventures in Wonderland. 1865

"Without a strategy the organization is like a ship without a rudder, going around in circles."

— Joel Ross & Michael Kami

"A goal is a dream with a deadline." - Napoleon Hill





Department of Health
and Human Services

Maine People Living
Safe, Healthy and Productive Lives

Paul R. LePage, Governor

Mary C. Mayhew, Commissioner

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Augusta, Maine 04333-0011**

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OCQI/BTC Staff:

**Julita Klavins, M.S.W.
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The primary purpose of the *Bend the Curve* Team is to provide support, consultation, assistance, and leadership in continuous improvement approaches and activities for State staff, work teams, and leaders as they seek to continually improve their work culture, systems, processes, and environments – in order to meet the mission of Maine State government and the expectations of Maine citizens.

We're on the net !

<http://www.maine.gov/dhhs/btc>

**Bend
the Curve**

Continuous Improvement Practitioners: BTC Intervention Facilitation Status

DHHS		DOL		DAFS	
Kate D. Carnes	C	Joan A. Cook	I-LL	Dennis Corliss	O
Nancy Cronin	C-O	Merle A. Davis*	L	Sam McKeeman	C-O
Theresa Dube	I-O	Eric Dibner	LCL		
Julita Klavins*	L	Timothy J. Griffin	L		
Jerrold Melville	LCL	John L. Rioux*	L		
Kristopher Michaud	I-O	Sheryl J. Smith	C-O		
Ann O'Brien	L			Sec. of State-BMV	
Terry Sandusky*	L			Scott Thompson	O
Bonnie Tracy	C-O	Univ. of Maine			
		Kim Jenkins	O	DOT	
		Brynn Riley	O	Michael Burns	C-O
				OPEGA, Legislature	
				Matthew K. Kruk	I-O
Community — Private Sector					
Rae-Ann Brann	L	Marcel Gagne	LCL	Douglas Patrick	O
Arthur S. Davis	C-L	Kelly Grenier	I-LL	Anne Rogerson	C-LCL
Ericka Deering	O	Ted LaCrone	O	Ghassan Saleh	O
Nancy Desisto*	C-L	Walter E. Lowell*	L	Clough Toppan	C-LCL
James Fussell	I-LCL	Henry B. McIntyre	C-LCL		
		Town of Durham, NH			
		David Kurz	C-O	Steve McCusker	C-O
		Michael Lynch	C-O	Todd Selig	C-O
* Certified-Bronze CI-P I - Inactive C - "Champion for Lean" - not facilitating L - Lead (LL-Learning) LCL - Learning Co-Lead O - Learning Observer					

BTC Calendar

You can check the *Bend the Curve* Calendar in the State of Maine's Outlook Public Folders for continuous improvement meetings, Clinicals, trainings, and other events.