

Beyond Tarot Cards and Crystal Balls:

*What your EMS agency needs to know about
Strategic Planning in order to survive*

Raphael M. Barishansky

VA EMS Symposium 2009

Opening thought

- *“Today's problems cannot be solved with the same thinking that created them”*

- Albert Einstein

Overview

- Realities
- Definitions
 - Strategy
 - Strategic planning
- Components
 - Situational Analysis (SWOT)
 - Mission statement
 - Vision statement
 - Goals and objectives
- Getting Started
- Implementation
- Conclusions



Realities

- *“County fire strategy misguided”*

Ocala.com

(FL) 01/01/06

- Article: Ambulance emergency
“Attracting volunteers is always a problem for small ambulance services”

Grand Forks Herald

(ND) 12/15/04

Realities

- *“Decreased usage and a revamped federal Medicare fee schedule could have Castle Rock Fire & Emergency Medical Services scrambling after 2005.”*

The Daily News Online
Castle Rock (WA) 01/04/05

- *“City increases some fees for ambulance services”*

The Herald Mail Online
Martinsburg (W. VA) 01/28/06

Realities

- *“EMS Shortage is acute....”*

Danbury New Times
(CT) 11/21/04

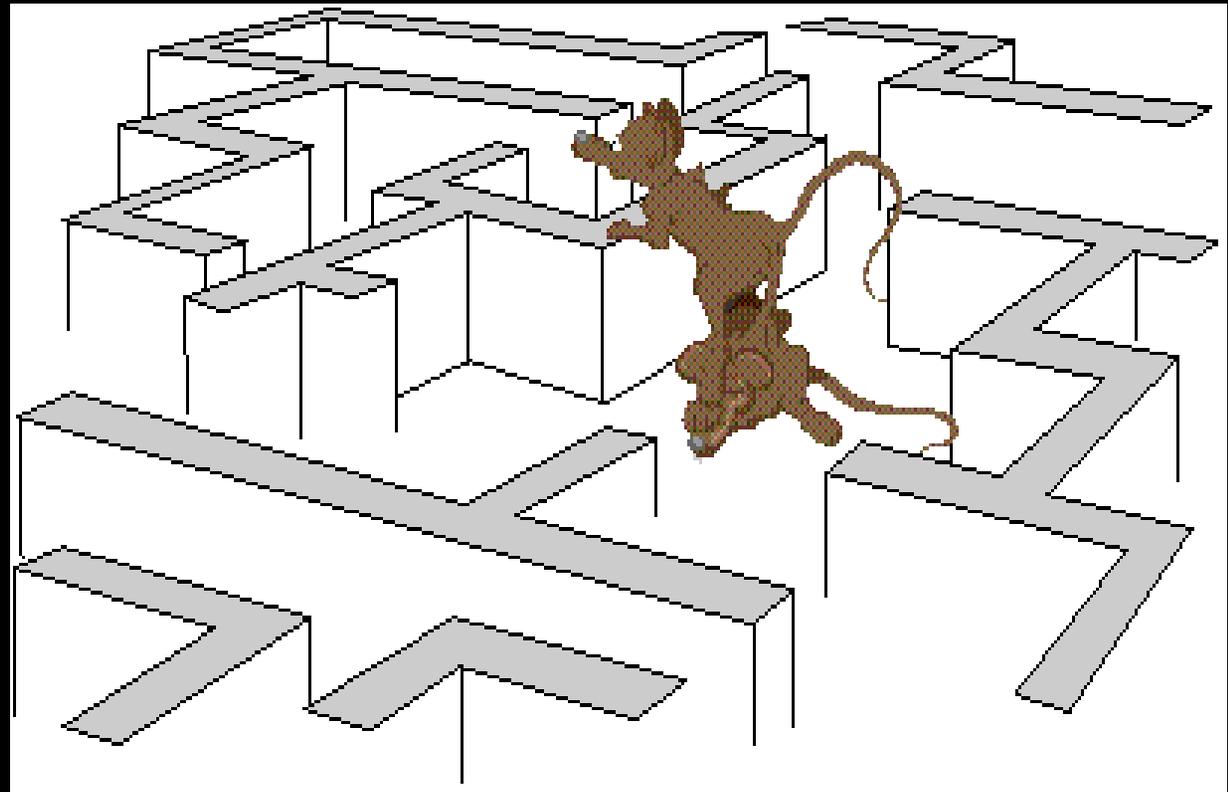
- *“Ambulance service going out of business....due to ongoing financial problems”*

Beaumont Enterprise –
Beaumont (TX) 3/22/06

Realities

What do all of those newspaper quotes have in common ?

What is your day-to-day reality?



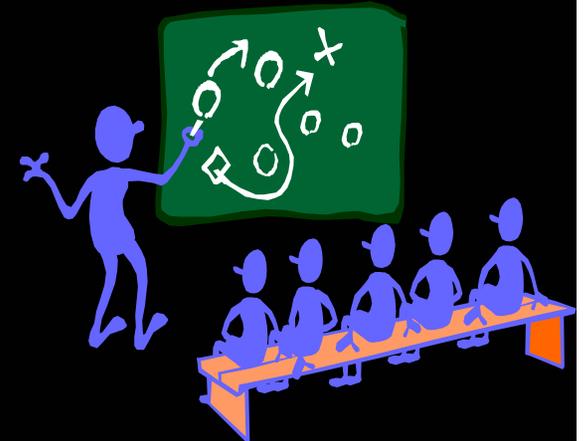
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Definitions

Strategy -

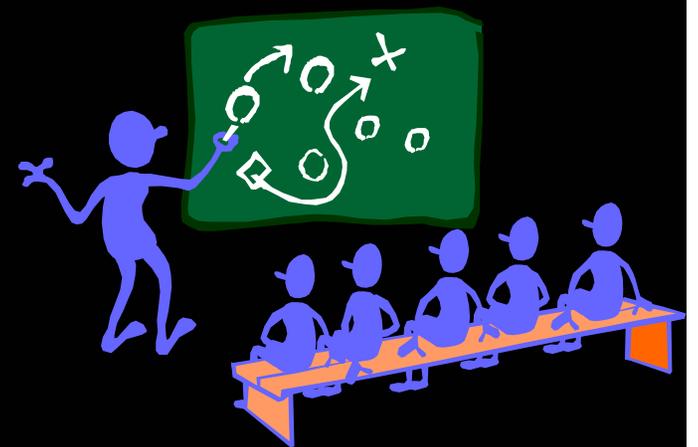
“The pattern of objectives, purposes or goals and major policies and plans for achieving those goals, stated in such a way as to define what business the company is in (or is to be in) and the kind of company it is (or is to be).”

- Webster's Dictionary



Definitions

- Working definition of strategy
 - A plan of action

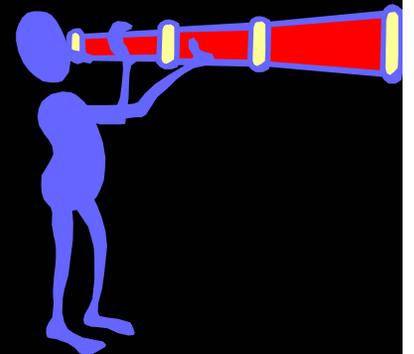


Definitions

Strategic Planning -

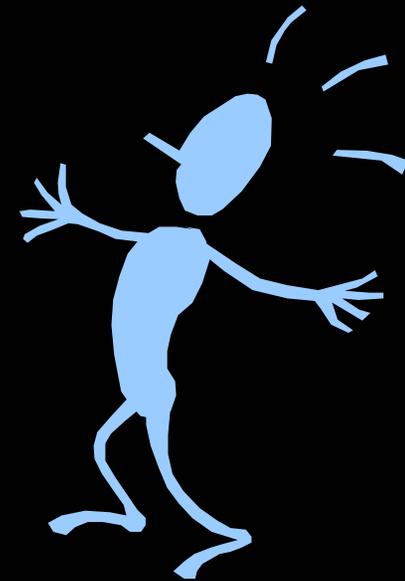
“A disciplined effort to produce fundamental definitions and actions that shape and guide what an organization is, what it does, and why it does it, with a focus on the future.”

- Webster's Dictionary



You are in charge...now what?

- Do you know what to do?
- Do you know your organization?
- Do you understand the challenges facing it?
- Do you understand the challenges facing EMS?



Is This Your EMS Agency?

- *Over 100 years of tradition.....
unimpeded by progress!*



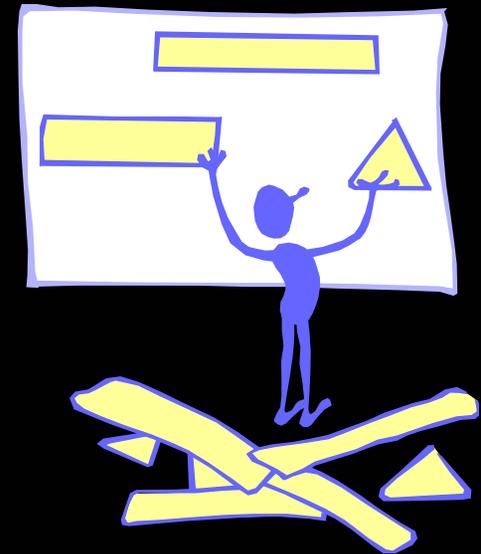
Or is this?

- **Team-work:**
the joint action by a group of people, in which individual interests are subordinate to the group's unity and efficiency



So what is an organization.....?

- A system that coordinates:
 - People
 - Jobs
 - Technology
 - Management Practices



What is organizational behavior?

- The study of human aspects of an organization, which includes:
 - Individual behavior
 - Group behavior
- Outcome = organizational structure + culture + process



What's in a structure...?

- How are tasks assigned
- Rules (SOPs/By-laws)
- Authority and responsibility
 - Is there always someone steering the boat?
 - Is it the right person?



Organizational Culture (a.k.a. Corporate Culture)

- All organizations have a culture and no two organizations have the same culture.
- Corporate culture is the beliefs, values, and symbols that an organization uses to define itself
 - *“How things are done around here.”*

Organizational culture a.k.a. corporate culture

- Determined by:
 - Beliefs
 - Philosophies
 - Values
 - Behaviors



What a strategic plan is:

- An organizing and focusing tool
- Gets everyone on the same page
- Recognizes past and present accomplishments
- Identifies challenges
- Develops goals
- Assists in budgeting



What a strategic plan isn't:

- A “quick fix”
- Independent decision-maker
- Substitute for the judgment of an agency’s leadership
- A predictor of the future
- Set in stone

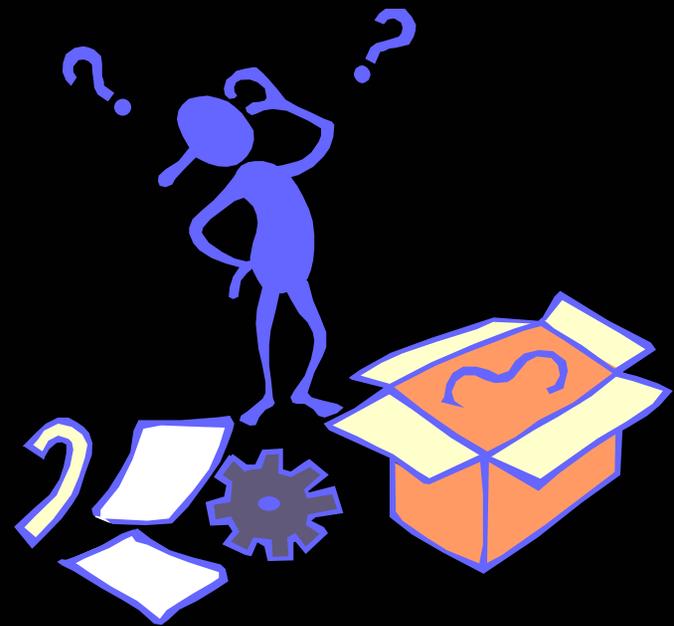


How it works

- Strategic planning answers four fundamental questions:
 - Where are we going?
(defined by a vision and mission statement)
 - How do we get there?
(defined by specific goals)
 - What is our blueprint for action?
(the action steps for achieving the goals)
 - How do we know if we are on track?
(assessment and revision)

Components of a Strategic Plan

- Situational Analysis
- Mission Statement
- Vision Statement
- Goals
- Objectives
- Implementation



Components: *Situational Analysis*



Components: *Situational Analysis*

- Situational Analysis
a.k.a. S.W.O.T.:
 - *Strengths - Internal*
 - *Weaknesses - Internal*
 - *Opportunities - External*
 - *Threats - External*



SWOT - Strengths

- Solid, educated leadership
- Increasing cooperation with other agencies
- Freestanding agency status
- In it for the right reasons – patient focus
- Sufficient medical input

SWOT - Weaknesses

- Lack of funding
- Poor public perception – Emergency Medical Service providers and John Q. Public.
- Lack of staff and depth of staff in various positions
- Communication challenges

SWOT - Opportunities

- Opportunity to improve public perception by increasing customer service
- Developing interest in Emergency Medical Services profession through career education
- Data collection development.

SWOT - Threats

- Unstable funding, decreased budget, competition for scarce resources
- More people doing – or wanting to do – what you do
- Decreased reimbursement for charges
- An increasingly litigious environment

Components: *Situational Analysis*

- Questions:
 - *Who are you?*



Components: *Situational Analysis*

- **Questions:**
 - *Who are you?*
 - *Where are you right now?*



Components: *Situational Analysis*

- **Questions:**
 - *Who are you?*
 - *Where are you right now?*
 - ***Where do want to be?***



Components: *Situational Analysis*

- **Questions:**
 - *Who are you?*
 - *Where are you right now?*
 - *Where do want to be?*
 - ***Can you actually get there?***



Components: *Situational Analysis*

- **Questions:**
 - *Who are you?*
 - *Where are you right now?*
 - *Where do want to be?*
 - *Can you actually get there?*
 - ***How can you achieve it?***



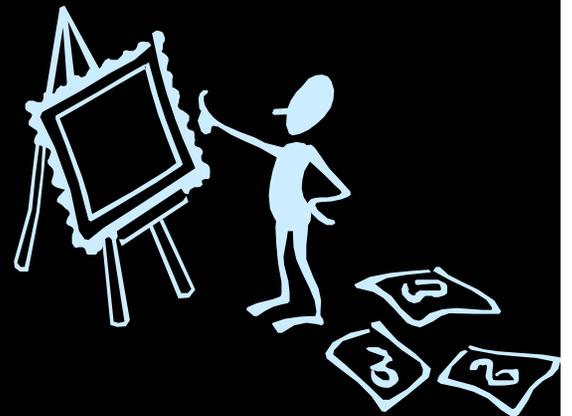
Components: *Situational Analysis*

- **Questions:**
 - *Who are you?*
 - *Where are you right now?*
 - *Where do want to be?*
 - *Can you actually get there?*
 - *How can you achieve it?*
 - ***Where do we start?***



Components: *Mission Statement*

- A snapshot of the what, how and why of your EMS organization
- A good mission statement will:
 - *Be brief (short enough to be remembered)*
 - *Be clear and understandable*
 - *Reflect attainable goals*



Components: *Mission Statement*

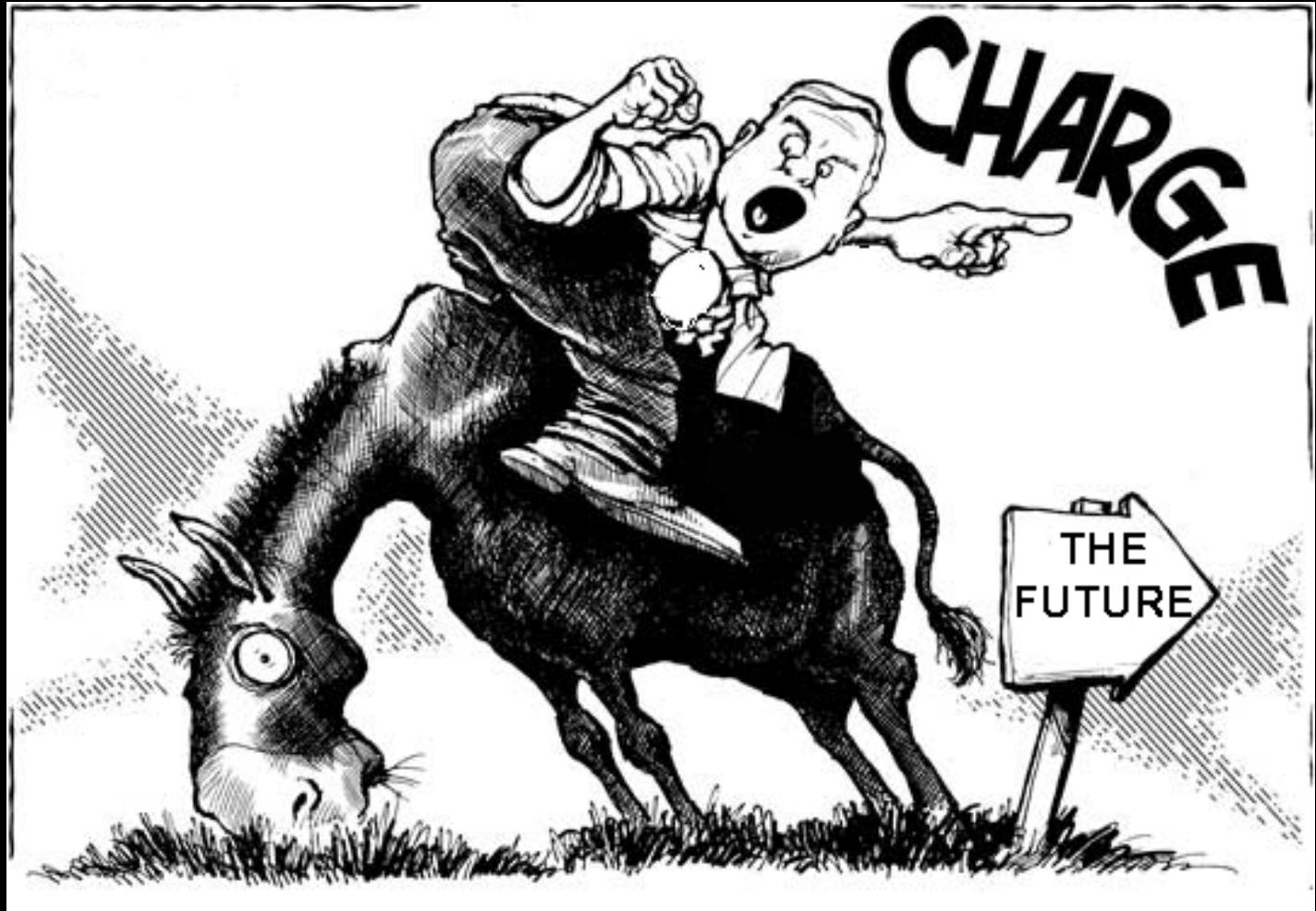
For instance:

“Boston Emergency Medical Services is a community based public health and public safety service that provides and manages the integrated pre-hospital care system for the City of Boston to improve the health of the community...”

- Boston EMS, Boston, MA



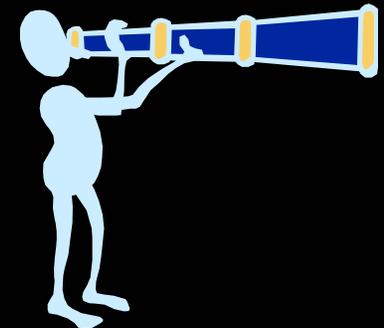
Components: *Vision Statement*



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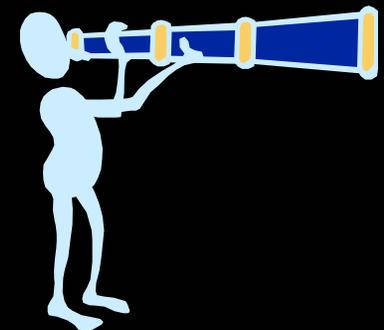
Components: *Vision Statement*

- Is a declaration that :
 - Conveys the image of how the organization wants its future to look
 - Provides a mandate for change
 - Inspires the organization to not stay satisfied with the status quo
 - Encourages all levels of personnel to align day- to- day activities with the future envisioned state.



Components: *Vision Statement*

- A good vision statement will:
 - Be rapidly understandable
 - Explain why you are doing what you are doing
 - Identify the impact you want to have
 - Speak to the heart and the mind



Components: *Vision Statement*

For instance:

“Austin EMS is committed to responding to the changing needs of an expanded service area and being a recognized leader in innovative, cost effective, clinically sophisticated delivery of comprehensive emergency medical services...”

- Austin/Travis County EMS



Components: *Goals*

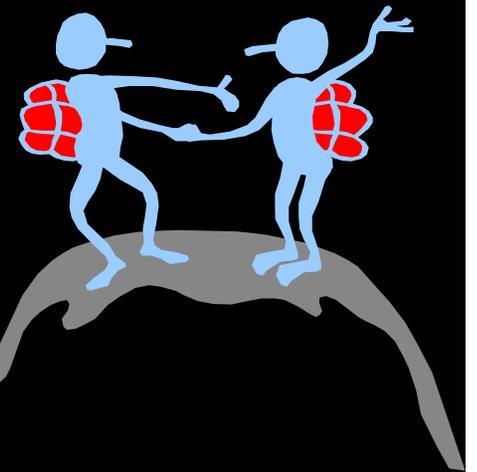
A goal is the larger components of your vision

A goal should:

- Answer the question
 - *“What do you want to accomplish?”*
 - State what the strategic plan is attempting to achieve.

Components: *Goals*

- Goals focus on ends, rather than means. Examples include:
 - Begin ALS first response (for a BLS agency)
 - Transition into a combination career/volunteer department (for a volunteer agency)
 - Capitalize on opportunities for operational growth (commercial agency)



Components : *Goals*

- Need to link Goals to:
 - *How the mission (statement) and vision (statement) get realized.*
 - *What plans you want or need to be realized immediately, short and long terms.*
 - *It's context – why this goal is included in your strategic plan*

Components: *Objectives*

- Objectives are action statements that are:
 - *clear*
 - *realistic*
 - *specific*
 - *measurable*
 - *time-limited*



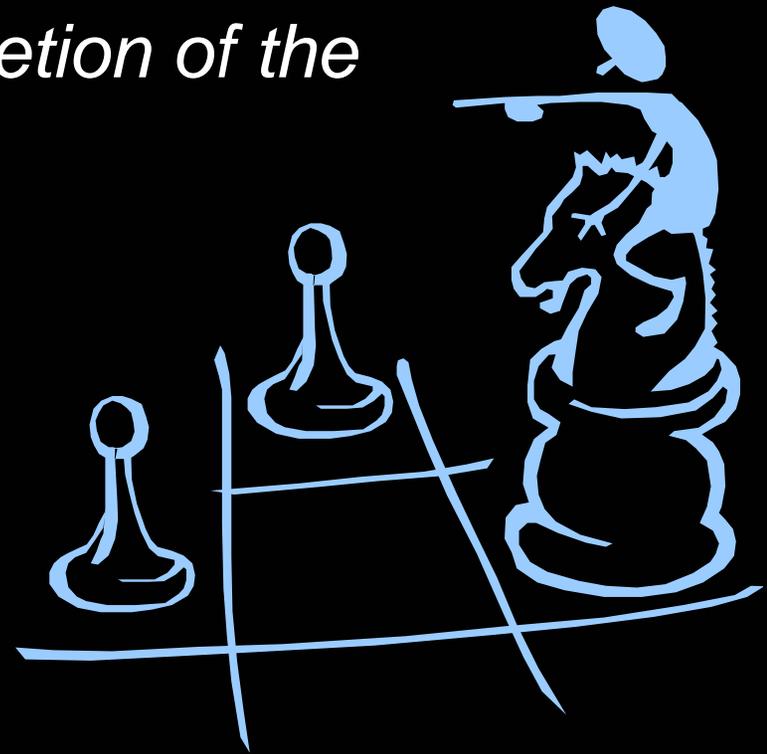
Components: *Objectives*

- Objectives should:
 - *Support the goals*
 - *State how the goals will be accomplished*
 - *Be broken down into clearly measurable pieces*



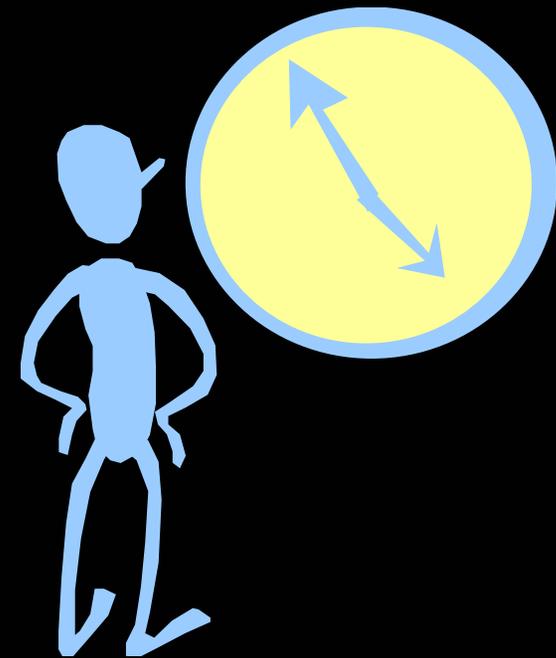
Components: *Objectives*

- **Accountability:**
 - *assigns an individual to oversee completion of the objective.*



Components: *Objectives*

- Timeframe:
 - *describes the “due date” for completion of the objective.*



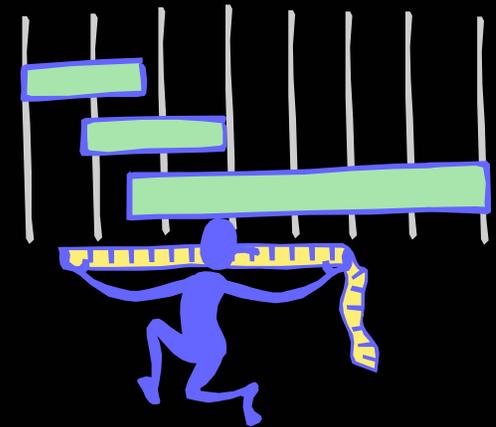
Components: *Objectives*

- **Resources:**
 - *describes the need for personnel (volunteer and professional), funds and / or materials required to reach each stated objective.*



Components: *Objectives*

- **Three categories:**
 - Immediate
 - accomplished \leq 1 year
 - Short-term
 - accomplished 2 - 5 years
 - Long-term
 - > 3 years to initiate
 - < 10 years to complete



Components: Outcomes and Measures

- Determining whether you have met your goals and objectives
- If so, keep moving forward
- If not, what are the likely causes?
- After you identify the causes, change things !!!

Visioning

- Creating a view for the future
- All levels must be involved
- If you aren't thinking about where you want to be, you are not really in control

Implementation

- As important as the plan itself
- Not a simple process
- Will need input from all levels



Implementation

- State 5 crucial points for each initiative in your strategic plan:
 - *Who?*
 - *What?*
 - *Why?*
 - *When?*
 - *How?*
(resources needed)



Implementation

To implement successfully it is important to:

- Communicate and motivate
(keep it on everyone's radar screen)
- Have alternatives
(be flexible if things don't work as planned)



Implementation - continued

- Keep it dynamic and ongoing
- Monitor progress
 - *set up milestones*
- Evaluate and acknowledge results
 - *continue the process based on those evaluations and results - not one-time events*



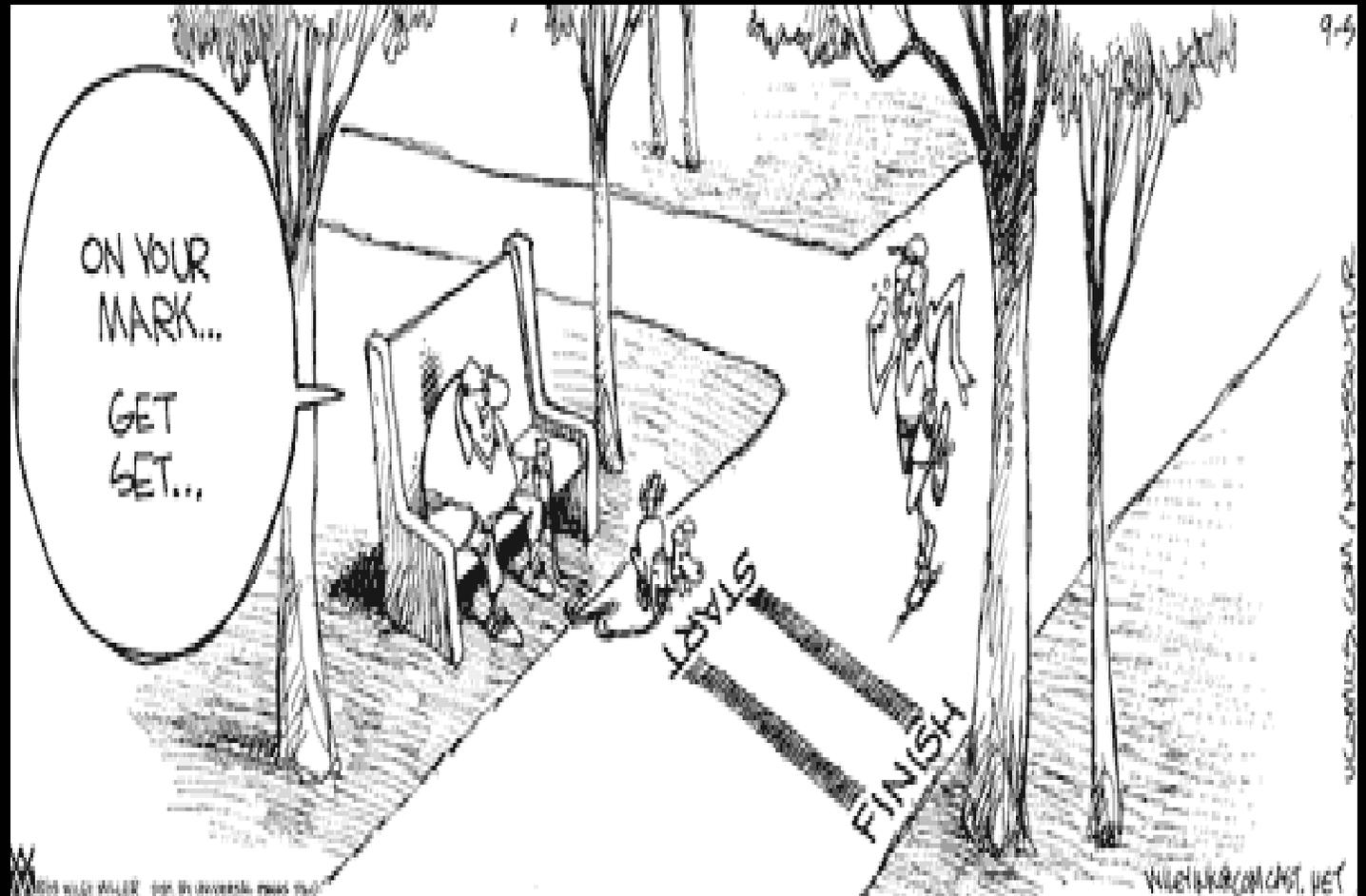
Implementation

Once the plan is done:

- ***Bind it!***
 - but don't put it on a shelf somewhere
- ***Use it!***
 - new member/employee orientation, board meeting, etc.



Conclusions



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Conclusions

- By definition, a good strategic plan will be challenging but achievable.
- It will not be easy - there will be significant personal and organizational effort needed in order to meet the various goals set forth.

Conclusions



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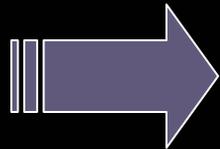
More conclusions

- EMS has traditionally – with few exceptions – employed a “shoot from the hip” approach in regard to planning.
- Due to the nature of our business, we usually operate in a reactive, rather than proactive, manner.

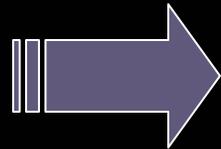
Still more conclusions

- Changing this reactionary mindset is paramount to developing and sustaining a healthy organization.
- Having your EMS agency establish a deliberate, well thought out blueprint for its future today, may be the thing that helps to keep it around for a long time to come.

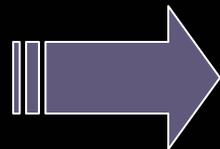
Final thoughts...



Strategic thinking leads to....

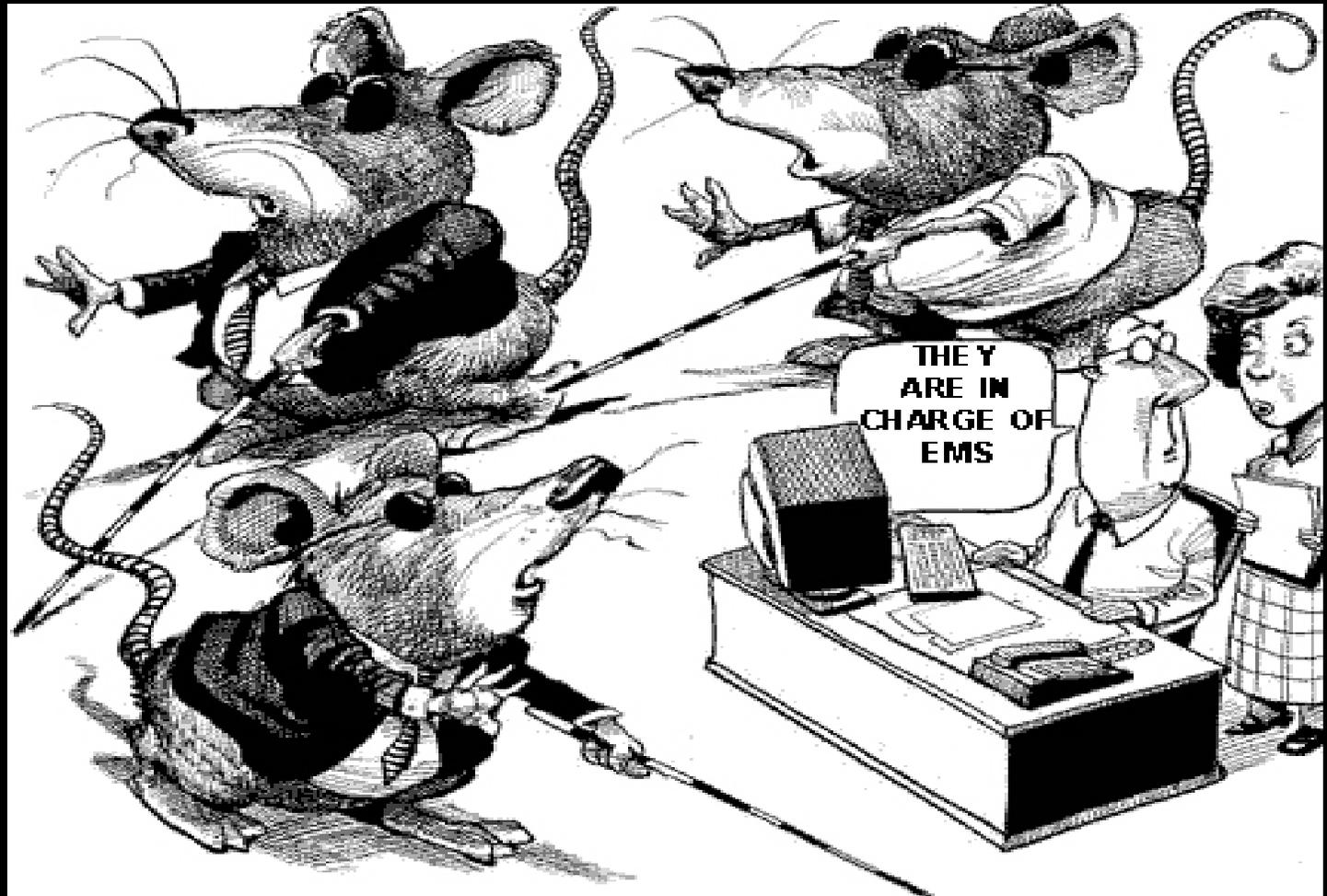


Strategic planning leads to.....



Strategic management

More final thoughts



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Concluding Perspectives....

“You can always amend a big plan, but you can never expand a little one. I don't believe in little plans. I believe in plans big enough to meet a situation which we can't possibly foresee now...”

- Harry S. Truman

“You've got to be very careful if you don't know where you are going, because you might not get there....”

- Yogi Berra

Resources

- *A Leadership Guide to Quality Improvement for EMS Systems*
 - NHTSA (1998)
- *EMS Agenda for the Future*
 - NHTSA (1996)
- *Virginia DOH OEMS text*
- *Review of Emergency Medical Services in Virginia*
 - Virginia General Assembly (2004)



Questions...



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Thank you....



rbarishansky@gmail.com

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