

Strategic Planning



A short introduction

ESMO Patient Track, 27th of Sept. 2014, Madrid/Spain

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Das Lebenshaus: Overview...

- Org. for patients with rare solid tumours: GIST, Sarcomas, Kidney Cancer
- Established for GIST: June 2003
- Non profit = a charitable assoc.
- Board (patients), 3 employees
- Support: More than 2.672 patients/families
- 22 regional groups in DE/CH/AT
- 2 multidisciplinary “Medical Science Boards”
- 2009: Das Wissenshaus – Institute of Oncology



SPAEN

Sarcoma Patients EuroNet e.V.

- April 2009 founded in Bad Nauheim
- EU: 26 Org. GIST/Sarcomas/Desmoide
- 4 Annual Conferences
- Board of Directors
- European “Medical Advisory Board”
- Networking & Projects



The European Network of Sarcoma Patient Advocacy Groups.

A Better Future For Patients With A Rare Cancer!

- Increasing the awareness of sarcoma
- Providing information and support
- Improving treatment and care
- Supporting research
- Building capacity

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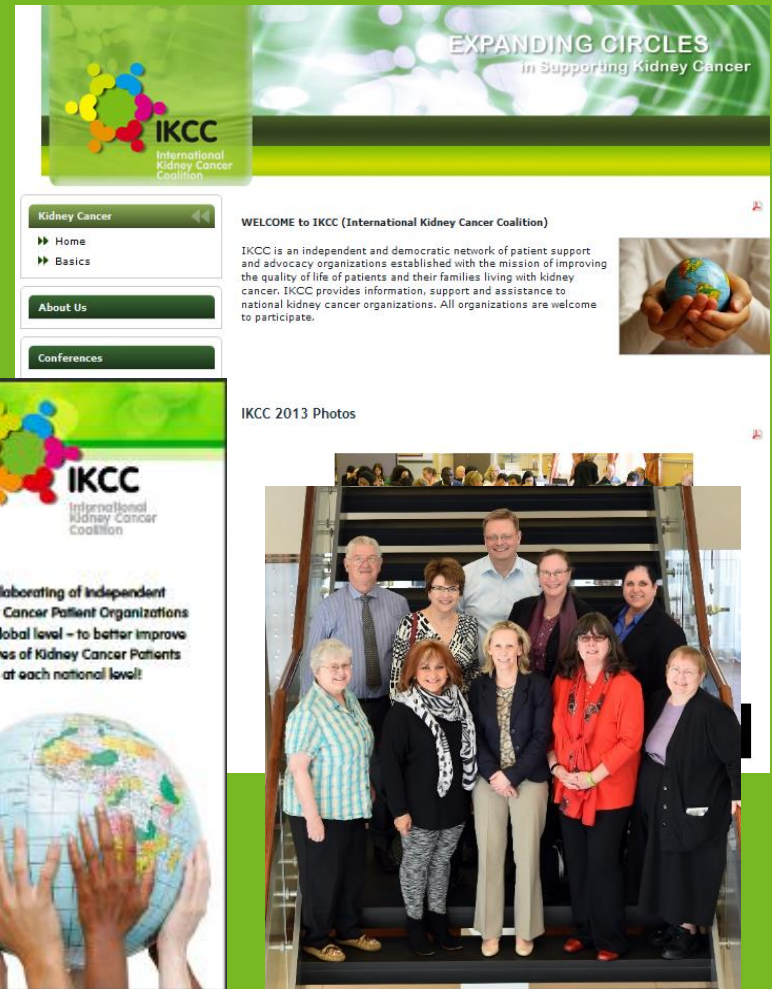


A Better Future For Patients With A Rare Cancer!

IKCC

Intl. Kidney Cancer Coalition

- Founded 2009
- 30 Org. worldwide
- 4 Annual Conferences
- Leadership-Team
- Networking & Projects



The image displays a screenshot of the International Kidney Cancer Coalition (IKCC) website and a group photograph of the 2013 leadership team.

Website Screenshot:

- Header:** Features the IKCC logo (a colorful circular arrangement of dots) and the text "EXPANDING CIRCLES In Supporting Kidney Cancer".
- Navigation Menu:** Includes links for "Kidney Cancer", "Home", "Basics", "About Us", and "Conferences".
- Welcome Message:** States "WELCOME to IKCC (International Kidney Cancer Coalition)" and describes IKCC as an independent and democratic network of patient support and advocacy organizations established with the mission of improving the quality of life of patients and their families living with kidney cancer. It also mentions that IKCC provides information, support, and assistance to national kidney cancer organizations and that all organizations are welcome to participate.
- Image:** A small image showing hands holding a globe.

IKCC 2013 Photos:

- Image:** A group photograph of the 2013 leadership team, consisting of ten individuals (seven women and three men) standing on a staircase.



Sarcoma
Patients
EuroNet

Strategic Planning



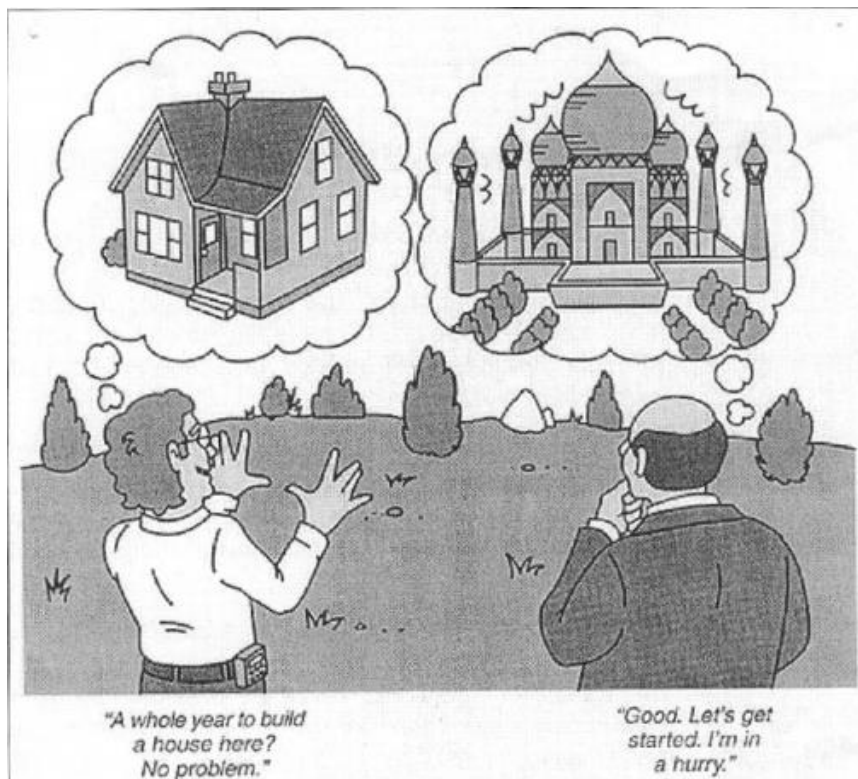
Some questions to consider...

- ✓ Is your group/organization thinking/planning strategically?
- ✓ Are you creating strategies from a shared vision?
- ✓ Do you learn from the past and gather information from and about the external environment?
- ✓ Do you have immediate measurable goals in place?
- ✓ Are individuals or the board (teams) accountable to a plan?
- ✓ Is the organization creative and flexible?
- ✓ Does it recognize, reward and institutionalize positive change?



Sarcoma
Patients
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“Shared vision?”



“Shared vision?”



“C'mon, put some muscle into it...we're not getting anywhere!”

A lot of areas are using „Strategies“...



What is a „Strategy“?

- A method or **plan** chosen to bring about a **desired future**, such as achievement of a **goal** or solution to a problem.
- The art and science of **planning** and marshalling **resources** for their most **efficient and effective use**.
The term is derived from the Greek word for generalship or **leading** an army.

Your team! Your goal! Your proceeding?



What is „Strategic Planning“?

- A **systematic process** of envisioning a **desired future**, and translating this **vision** into broadly defined **goals** or objectives and a **sequence of steps** to achieve them.
- A systematic approach through which an organization agrees on priorities that are essential to its mission and responsive to its environment.

**Future/Vision/
Mission**

**Goals/
Priorities**

Analysis

**Agreement/
Strategy**

**Sequence
of Steps**

Resources

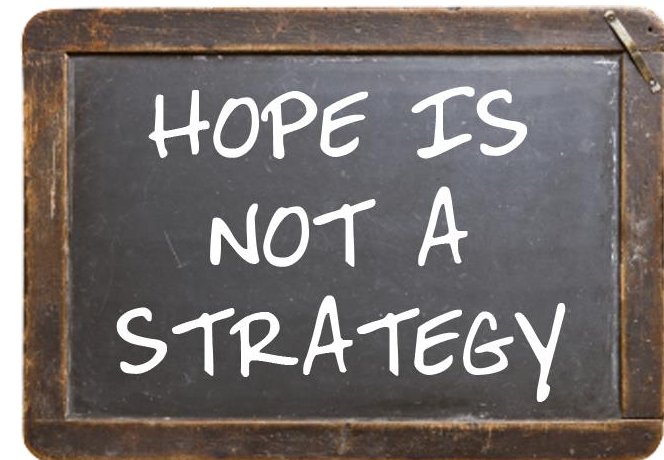
Environment

Action Plan

Measures

What is „Strategic Planning“ not – e.g.?

- A prediction (prognosis) for the future
- A smooth, predictable, linear process
- A substitute for judgment of leadership



Benefits of a „Strategic Planning“?

- Defines mission, vision & values
- Establishes realistic goals, objectives & strategies
- Ensures effective use of resources
- Provides base to measure progress
- Develops consensus on future direction
- Builds stronger teams
- Solves major problems



Some „thoughts“...

- Strategic planning involves choosing the highest priority achievements that an organization is prepared to commit to over a period of 3 – 5 years. The process of planning emphasizes conscious, thoughtful choices.
- Strategic planning builds commitment
- Important for all levels of the organization to be involved
- A Strategic Planning Committee (SPC)
- Outside consultant/facilitator (paid or pro bono/volunteer)
 - to facilitate conversations
 - to capture external interviews
 - to move the process along
 - to (maybe) draft the final plan
- In the end: Plan must be owned by the board/staff in order to move it successfully and strategically into the future...



The 1st activity

- To assess the current situation and review the relevance of the mission and programs...
- Developing a “plan for the plan” e.g.
 - the outcome(s) of the planning process
 - strategic issues to address
 - planning activities
 - time frame.
- SPC’s composition:
Full board and staff involvement (+ facilitator?)
- Thinking, collective experience, external and internal research

The 2nd activity

- Summarize the organizational history
- Detailing what has or has not been accomplished since the last planning
- Empirical data, such as budget, fundraising and program trends, should be collected so that the SPC can better understand the choices to be made during the strategic planning process
- Soft and a hard composition:
The softer side includes mission, visions and values and beliefs
The harder side includes outcome goals and strategic objectives that include milestones, metrics and benchmarks...

The „BIG“ five...(1)

- **Mission:**

Why does the organization exist?

What is the reason for being?

Clear, short statement that focuses on attention in one clear direction by stating purpose of the group's uniqueness

- **Vision:**

How will your community be changed, and made better by what you have done?

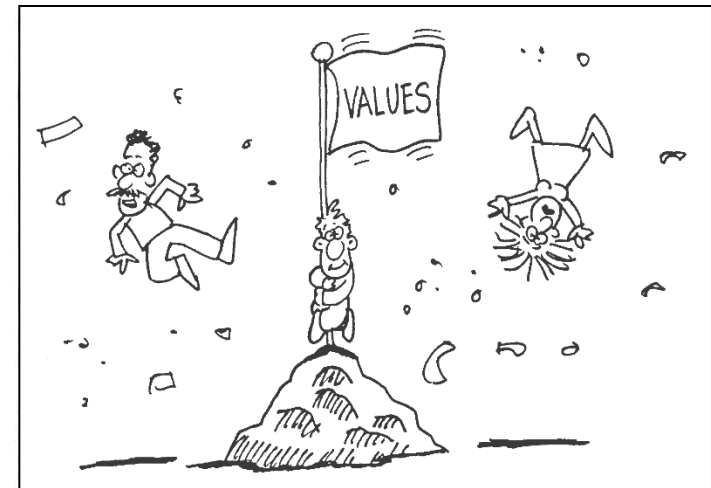
What is your organization's vision of excellence

Has to be realistic and not something impractical

- **Values/Beliefs:**

What core principles should guide your org. in the present and into the future?

How people treat each other and what is most important to the organization



The „BIG“ five...(2)

- **Goals:**

These are outcome statements that define what an organization is trying to accomplish, both programmatically and organizationally.

Goals need to be S.M.A.R.T.

Specific, **M**easurable, **A**chievable, **R**ealistic, **T**imely

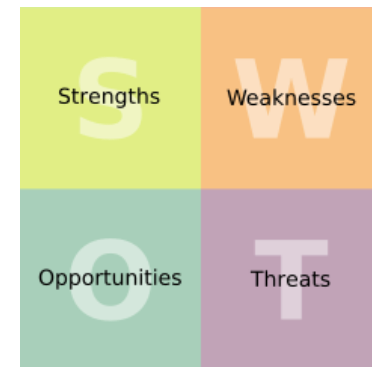
- **Strategies:**

How are you going to meet the goals?

Remember: If the strategies get too detailed, you are moving away from strategic planning and into annual operational planning.

SWOT-Analysis

- Opportunity for all to come together and analyze the strengths, weaknesses, opportunities, threats (SWOT) facing the organization.
- The SWOT analysis helps everyone focus on key priorities.



SW = Strengths & Weaknesses

- The strengths and weaknesses are **internal**
 - how is the organization positioned
 - what are the internal challenges
 - what are the areas where the organization shines
 - organization's reputation and history
 - weaknesses such as capacity, funding, infrastructure etc.



Questions:

- Resources or strengths that help us to accomplish our mission or mandate or create value for our members (and their patients)
- Internal weaknesses are deficiencies in resources or capabilities that hinder us to accomplish our mission or mandate or create value for our members (and their patients)

OT = Opportunities & Threats

- Opportunities and threats are **external**
 - new program areas
 - new funding
 - community collaborations
 - threats could be government regulations, economy, competition, dependencies



Questions:

- External **opportunities** are primarily outside factors or situations that we can take advantage of to better fulfill our mission or mandate or create value for our members (and their patients)
- External **threats/challenges** are primarily outside factors or situations that can affect us in a negative way take – making it harder to fulfill our mission or mandate or create value for our members (and their patients)

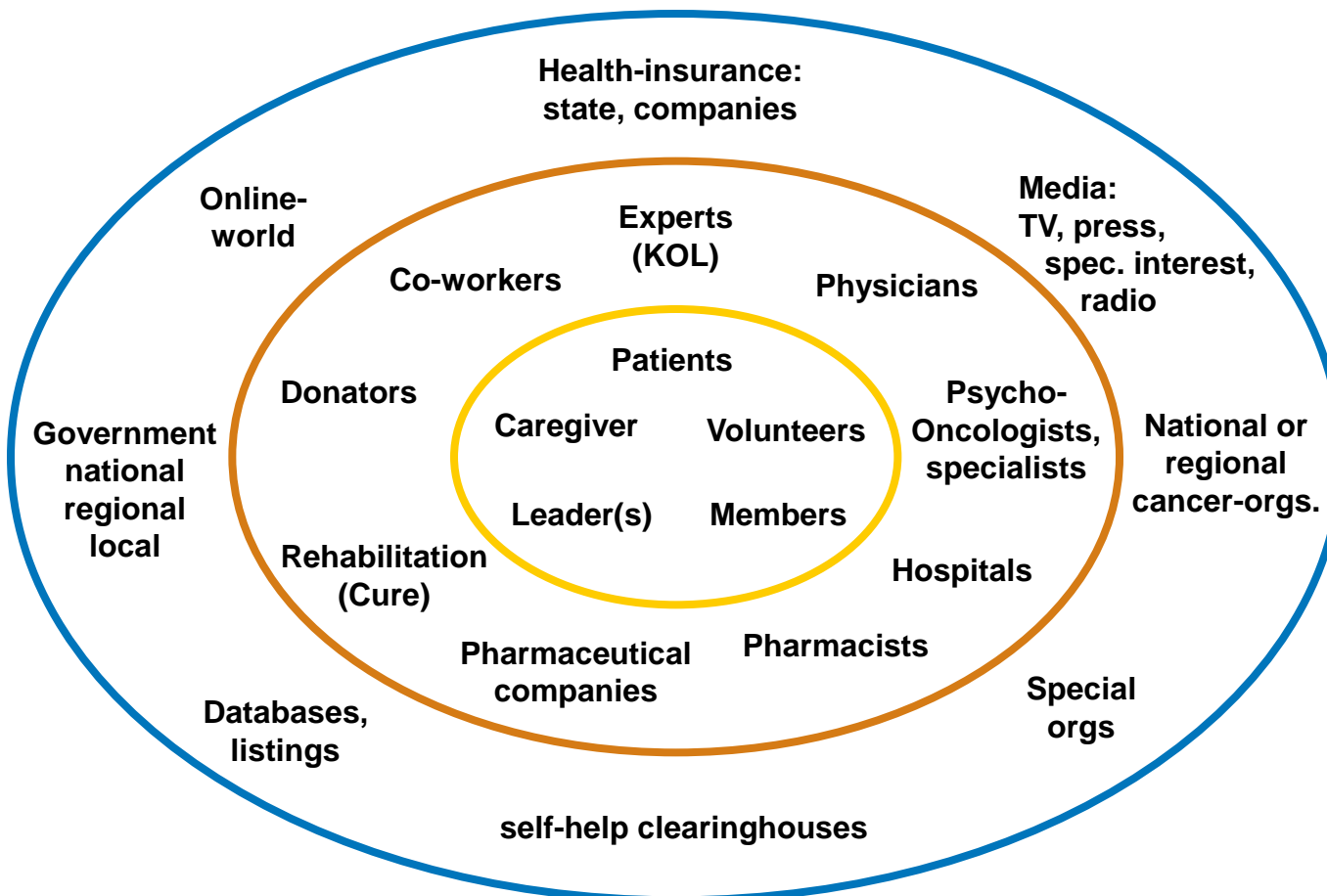
SWOT and other tools...

- SWOT identifies the current environment - will inform your plan.
- Screening “External Relations” e.g.
 - Who are the main stakeholders, the org. is dealing with?
 - What are their roles, influences, interests, expectations?
 - Are they “target groups/target audiences” for future actions?
- But also – collection of available data?
 - Reg. specific target groups?
 - Reg. environment?
 - Reg. legal influences?
 - Reg. needs/challenges/expectations of e.g. your patients?
- To complete “your picture” you can also initiate:
Surveys, interviews, focus groups, etc.

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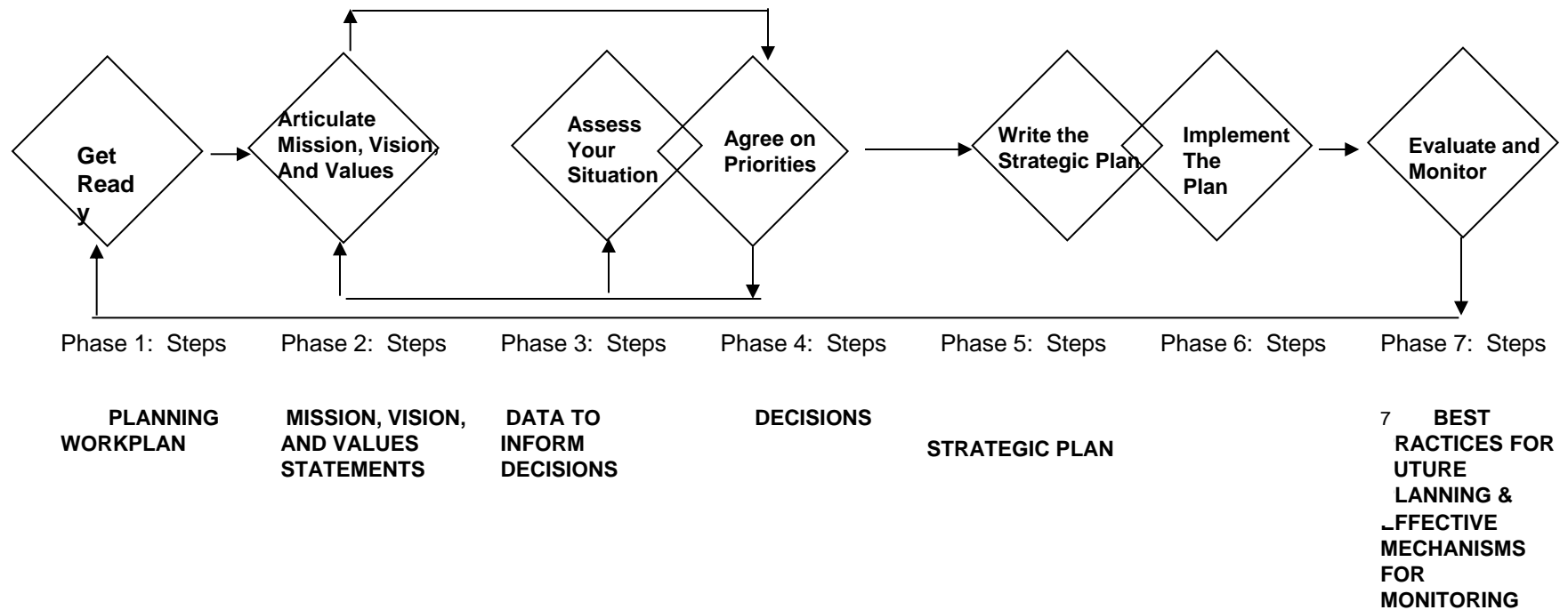
External Relations...



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Developing the plan...



An example: IAPO

CONTENT (18 pages)

- Introduction
- IAPO's Vision and Mission
- IAPO's Strategic Plan 2010–2014
- IAPO's Strategic Goal 2010–2014
- IAPO's Strategic Objectives
- IAPO's Values and Approaches
- Healthcare Policy Issues
- Strategic Review and Planning Methodology
- Operating Environment



An example: World Hepatitis Alliance

World Hepatitis
Alliance

World Hepatitis Alliance
Strategic plan 2013 – 2015
January 2013

This is **hepatitis...**

An example: World Hepatitis Alliance



An example: World Hepatitis Alliance

STRATEGIC GOAL 1:

Many more countries with comprehensive national hepatitis strategies in place or at least in development.

Just a handful of countries currently have such strategies. Without government commitment little progress is possible and the clearest sign of that commitment is a comprehensive national hepatitis strategy that covers everything from awareness and prevention through to treatment. Strong patient advocacy will be critical for this goal and patient group involvement with governments will be crucial to the development of *good* strategies. Currently patient groups are engaged with governments in some form in about 30 countries.

ACTION PLAN

Action 1.1: We will promote greater involvement of Governments in [World Hepatitis Day](#), which is an extremely useful lever to push for more action and ultimately a national strategy. This will include setting up a campaign theme, liaising with the community and governments as well as WHO.

Action 1.2: We will ensure [regional strategies](#) are in place through our work with WHO and their regional offices. This will include advocacy work with countries ahead of relevant Regional Committee meetings.

Action 1.3: We will devise and implement a [strategy blueprint](#) on how to develop national strategies. This will be a web-based tool that allows countries to build an evidence-based strategy best suited to their particular situation (GDP, health system, epidemiology, etc)

Action 1.4: We will monitor each government's action on hepatitis, including community engagement, on a regular basis through a biennial [Alliance/WHO Viral Hepatitis: Global Prevention & Control report](#). We will support our members in using the report in their advocacy work.

Action 1.5: We will [second a full-time staff member](#) to WHO EURO to be the hepatitis focal point for the 53 countries of the region and to produce a regional hepatitis strategy.

Action 1.6: We will continue to [second a staff member](#) to WHO's Global Hepatitis Programme team, and assist them with running the [Global Hepatitis Network](#) which will produce a series of technical norms for countries.

Cont

An example: World Hepatitis Alliance

STRATEGIC GOAL 1:

Many more countries with comprehensive national hepatitis strategies in place or at least in development.



ACTION PLAN *Cont.*

Action 1.7: We will continue to support patient advocacy groups in their **advocacy work** and, where necessary, can send a task force on an ad hoc basis to a particular country where significantly more progress could be achieved with our support.

Action 1.8: We will build a **new website** in 7 languages that will support patient groups by sharing best practice and allowing groups, for example, to offer to carry out pilot projects for governments based on what has worked elsewhere, particularly those involving working with marginalised communities such as drug users and immigrants that governments may not be able to reach.

Action 1.9: We will continue to engage with key actors working in the field of **access to treatment** in order to advocate for affordable drugs, while respecting the principle of incentivization of innovation. We will also support efforts regarding the inclusion of hepatitis in programmes led by the Global Fund, PEPFAR, the Gates Foundation, etc.

Key performance indicators:

2013

- 60 governments participating in World Hepatitis Day.
- 25 countries with national strategies either in place or in development.
- The Alliance and/or patient advocacy groups engaged with government in 40 countries (as evidenced by the *Viral Hepatitis: Global Prevention & Control* report, reports from groups or Alliance work).
- Regional Committees in the Americas and South East Asia have adopted regional strategies.

Cont.

An example: World Hepatitis Alliance

STRATEGIC GOAL 1:

Many more countries with comprehensive national hepatitis strategies in place or at least in development.



Key performance indicators - cont:

2014

- 75 governments participating in World Hepatitis Day.
- 35 countries with national strategies either in place or in development.
- The Alliance and/or patient advocacy groups engaged with government in 50 countries.
- Regional Committees have adopted regional strategies in two additional regions.

2015

- 90 governments participating in World Hepatitis Day.
- 50 countries with national strategies either in place or in development.
- The Alliance and/or patient advocacy groups engaged with government in 60 countries.
- Regional Committees have adopted regional strategies in the last two regions.

From 2014 we will co-host, with WHO and US CDC, an annual or biennial [Global Viral Hepatitis Summit](#) that will showcase effective public health interventions and provide a forum for countries to interact with both WHO technical officers from HQ and the regions and the pharmaceutical industry (please note the budget for this project is not included in the overall budget).