



Advancing Philanthropy Worldwide

CARTER



Strategic Plan



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Presented by:
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Purpose of Strategic Planning

- ▶ Outlines a clear path and direction
- ▶ Brings a sense of focus
- ▶ Creates alignment between activities, funding and outcomes
- ▶ Builds awareness and stakeholder engagement
- ▶ Demonstrates impact and accountability





Guiding Documents and Principles

- ▶ Special Act of the Indian River County Hospital District

- ▶ Core Values
 - Stewardship
 - Partnerships
 - Integrity
 - Respect
 - Accountability
 - Leadership





Strategic Plan





Process

Assessment

- Launch Effort
- Comprehensive Document Review
- Stakeholder Engagement and Input

October - November

Retreat

- Review and Discuss Assessment Findings
- Strategic Visioning

December

Draft Framework

- Draft Mission and Vision Statements
- Initial Strategic Priorities

January - February

Final Plan

- Final Mission, Vision and Strategic Priorities
- Develop KPIs
- Create Action Plan

March - April



Summary Findings from the Assessment

- ▶ District viewed as very effective and impactful
- ▶ District's investments and efforts viewed as critical to meeting community needs
- ▶ Changing demographics will continue to impact the community's needs
- ▶ Increased focus on prevention and enhancing collaboration is imperative



Mission and Vision Statements



- ▶ It guides the work of the organization
- ▶ It should be plausible, inspirational and clear



- ▶ It defines how we will have an impact
- ▶ It should inspire and excite the community



Current Mission and Vision

Mission Statement

To ensure access to care and services resulting in improved health outcomes

Vision Statement

Working to improve the health of our community through a collaborative effort



New Mission and Vision

Mission Statement

To improve the health of Indian River County residents

Vision Statement

An innovative and integrated healthcare network that improves the health of Indian River County residents



Strategic Priorities

- ▶ Describes the critical focus areas for the District over the next few years
- ▶ Lays the groundwork for a roadmap to focus on opportunities to achieve the vision
- ▶ Provides the foundation for maintaining consistent strategy over time
- ▶ Helps Trustees and staff make decisions and align resources toward a common direction
- ▶ Inspires the District and its stakeholders to raise the bar for what they can accomplish together





Strategic Priorities

- 1. Focus efforts and investments on programs that strengthen primary care, behavioral/mental health, and prevention.**
- 2. Improve access to healthcare services by reducing financial barriers.**
- 3. Convene the community to strengthen the continuum of care for Indian River County.**



Key Performance Indicators

Increase in the % of adults who say their overall health is “good” or “excellent.” (Source: Florida CHARTS)

1

Focus efforts and investments on programs that strengthen primary care, behavioral/mental health, and prevention.

KPI:

% of District funds focused on primary care, behavioral /mental health, and prevention.

(Source: IRCHD)

2

Improve access to healthcare services by reducing financial barriers.

KPI:

Decrease in the % of adults who could not see a doctor at least once in the past year due to cost.

(Source: Florida CHARTS)

3

Convene the community to strengthen the continuum of care for Indian River County.

KPI:

Solutions identified, and District initiatives implemented.

(Source: IRCHD)



Strategic Action Plan

1. Focus efforts and investments on programs that strengthen primary care, behavioral/mental health, and prevention.

Activity	Deliverable	Timeframe
1. Develop criteria to evaluate how a program/service proposal aligns with the District's strategic plan.	Criteria rubric	Completed by June 30, 2022
2. Assess every funding request against the criteria, including the strength of program metrics and ability to track program impact.	Funding recommendations provided to Trustees	April to June annually
3. Conduct an annual program audit of all District funded organizations to demonstrate accountability and ensure the appropriate expenditure of tax dollars.	Report of a cost allocation plan to the Trustees; report of observations to the public	Completed annually by August 15
4. Annual budget and plan that aligns District funding and programs to the strategic plan.	Approved budget	Completed each September



Strategic Action Plan

2. Improve access to healthcare services by reducing financial barriers.

Activity	Deliverable	Timeframe
5. Transition to 100% program and outcome funding.	Financial assistance application process discontinued	By September 2023
6. Create a program that helps offset the cost of healthcare visits.	Transition county funding of healthcare needs to District budget	By September 2023
7. Identify and fund public/private partnerships and programs to reduce financial barriers to healthcare.	A multi-source financial structure supporting programs available to all residents	Ongoing
8. Provide and analyze internal and external data pertaining to income, funding assistance and payer sources available to residents.	Report of analysis and findings	Annually before budget
9. Conduct additional research into the financial barriers to help focus and direct funding to more specific areas.	Summary of findings	Ongoing



Strategic Action Plan

3. Convene the community to strengthen the continuum of care for Indian River County.

Activity	Deliverable	Timeframe
10. Continue the MH/SA Delivery Committee to bring and sustain new services and programs for the county.	Recommendations for new/additional programs and services	Ongoing
11. Schedule regular educational and training opportunities for the Trustees.	Presentation schedule of health-related programs and community activities	Monthly
12. Conduct Trustee-led presentations, speaking engagements and town halls highlighting the Hospital District's purpose/value to the community.	Schedule with community groups, i.e., taxpayer's association, Rotary, Exchange Clubs, etc.	Quarterly
13. Continue analyzing data systems/sets to identify opportunities and gaps.	Data-driven analysis of opportunities and gaps	Ongoing
14. Conduct regular individual and group meetings of providers.	Provider organizations are up to date with current healthcare-related activities	Ongoing
15. Strengthen existing and establish new partnerships, engage with community partners, and connect with public health officials to collectively improve health outcomes.	Key contacts identified; opportunities for staff and trustees to connect with community leaders	Ongoing
16. Hold one to two focus groups per year to prioritize the community voice and deepen our understanding of the causes of health inequity in Indian River County.	Implement at least one strategy/solution	Ongoing
17. Engage in Health Fairs and other community activities to increase awareness of the District's role and accomplishments.	Summary of learnings from participation	September 2022 to August 2023



Next Steps

- ▶ Share with the community and stakeholders
- ▶ Frame discussions and decisions around the Strategic Priorities
- ▶ Continually evaluate and refine the Key Performance Indicators and Action Plan
- ▶ Execute!





Thank You!



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