



Critical Access Hospital Finance and Operations Webinar Series

Creating a Durable Strategic Plan for Your CAH December 16, 2025

The mission of the Oregon Office of Rural Health is to improve the quality, availability and accessibility of health care for rural Oregonians.

The Oregon Office of Rural Health's vision statement is to serve as a state leader in providing resources, developing innovative strategies and cultivating collaborative partnerships to support Oregon rural communities in achieving optimal health and well-being.

Webinar Logistics

- Audio is muted for all attendees.
- Select to populate the  to populate the chat feature on the bottom right of your screen. Please use either the chat function or raise your hand  on the bottom of your screen to ask your question live.
- Presentation slides and recordings will be posted shortly after the session at: <https://www.ohsu.edu/oregon-office-of-rural-health/critical-access-hospital-programs>.





Robert Zondag, CPT brings leadership experience as an entrepreneur and executive in financial services. His clients have included financial institutions, technology companies, health care organizations and government entities. Robert is passionate about bringing clarity to his clients when they face complex business issues and regulatory matters. His experience includes appointments to the State of Wisconsin Medical Examining Board and a Commissioner on the Interstate Medical Licensure Compact Commission.



Michelle Joseph, MBA brings over 15 years of experience as a consultant working with startup, public and private organizations. She partners with leadership teams to create strategic plans with a focus on execution. She helps clients elevate customer experience by aligning employee engagement with business outcomes. Michelle is passionate about helping front-line teams understand their roles and guiding leadership to invest in the employee experience as a driver of long-term growth and retention. She focuses on helping clients explore practical, human-centered applications of AI to improve internal processes and elevate the customer experience.

A smiling male doctor with dark hair, wearing a white lab coat over teal scrubs, is shaking hands with a man in a light blue shirt. They are in a meeting room with other people in the background. The doctor has a name tag that says "MICHAEL LAM".

Strategic

Planning

Creating a durable plan to thrive

WIPFLI

Today's Discussion

- Explore what high performing health care organizations are doing with their strategic planning.
- Review some building blocks organizations are putting into place today to succeed and thrive.
- Review some pitfalls organizations face when they do not have a plan in place.
- Share how organizations are intentionally integrating patient experience and community engagement into their plan.
- Give you actionable tips on how to create and drive a strong strategic plan.

High performing
organizations and their
commitment to a plan



Fundamentals of Creating a Strong Strategic Plan

Characteristics of a high performing organizations' plan:

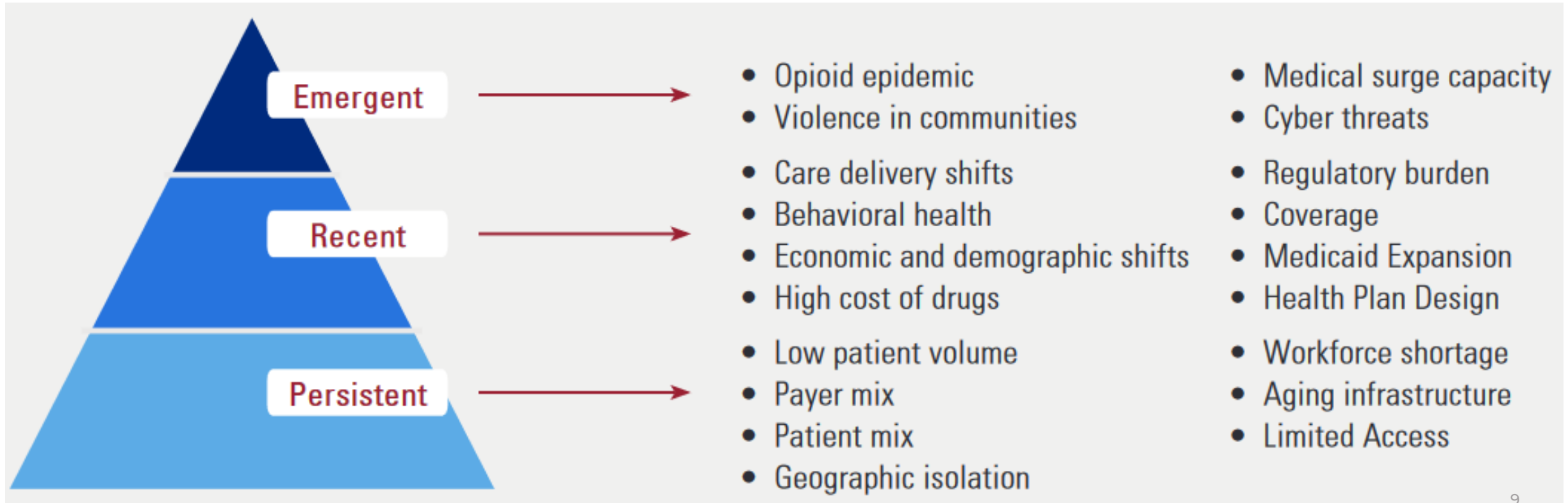
1. Place value on the planning process.
2. Frame the overall narrative of the plan as the 'North Star'.
3. Allocate resources to properly develop the plan that includes:
 1. Time
 2. Talent
4. Maintain the belief that the healthcare is constantly evolving, therefore the plan will be evolving.

Aligning on what Matters



Keep an eye on the challenges of today...and plan for tomorrow

Maintain the belief that disruptors are constantly evolving, therefore the plan will be evolving.



Selecting a Methodology to follow

Traditional Linear Planning

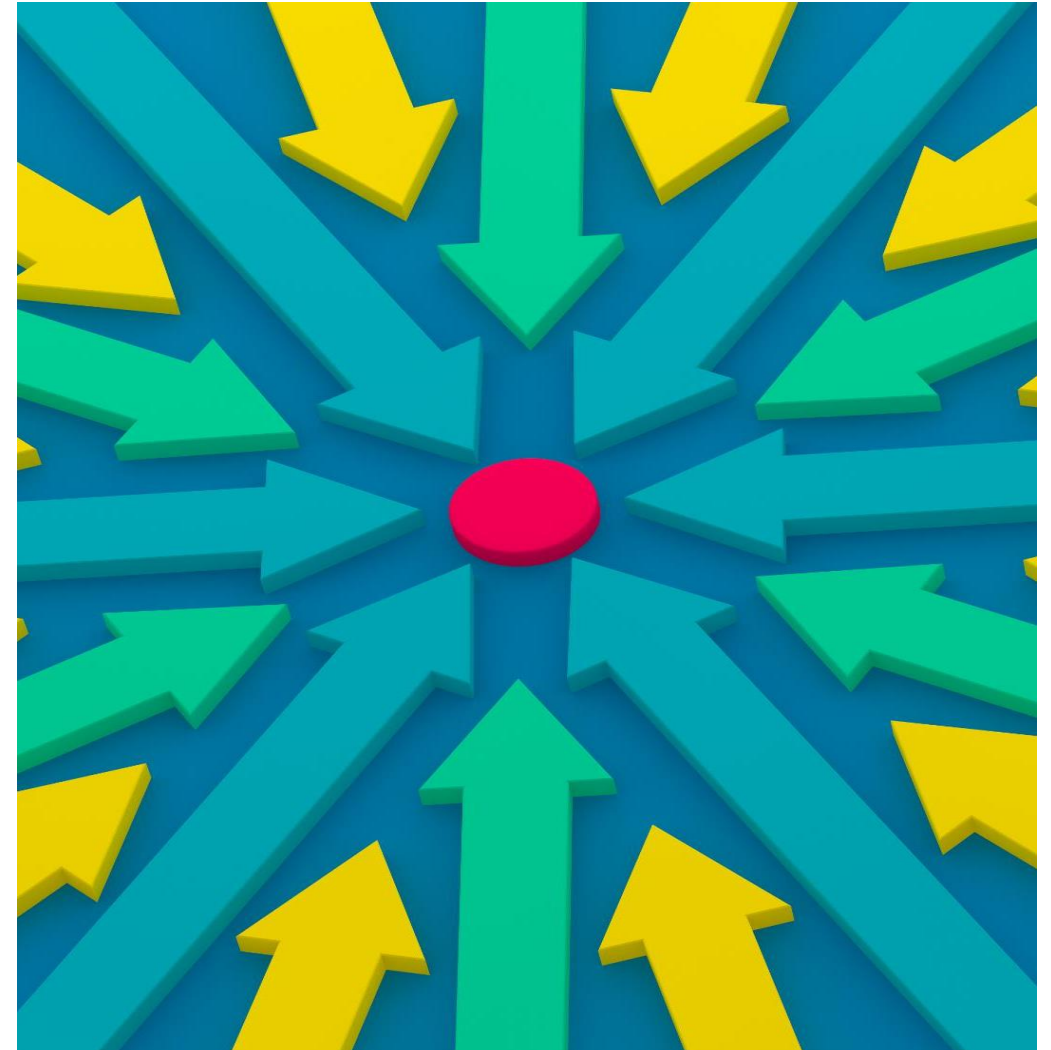
Traditional strategic planning follows a step-by-step linear process that emphasizes predictability and structure.

Iterative Flexible Frameworks

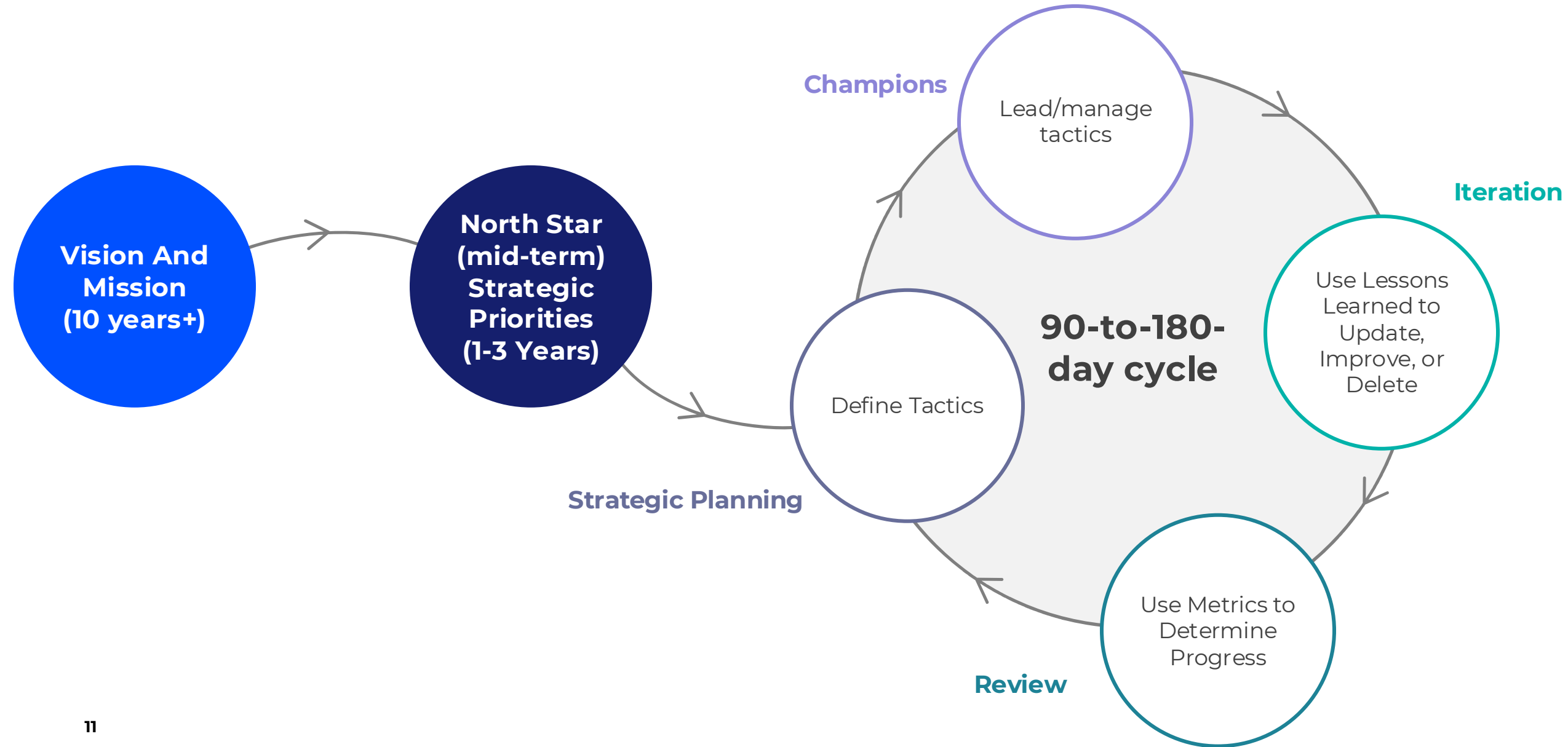
Flexible methodologies like **Agile Planning** use iterative cycles allowing ongoing adjustments to respond to changing conditions.

Selecting Appropriate Methodology

Organizations choose planning methods based on their goals and operational realities to maximize effectiveness. The most successful organizations tend to lean towards an Agile Methodology



Agile Methodology – Lifecycle of a Plan

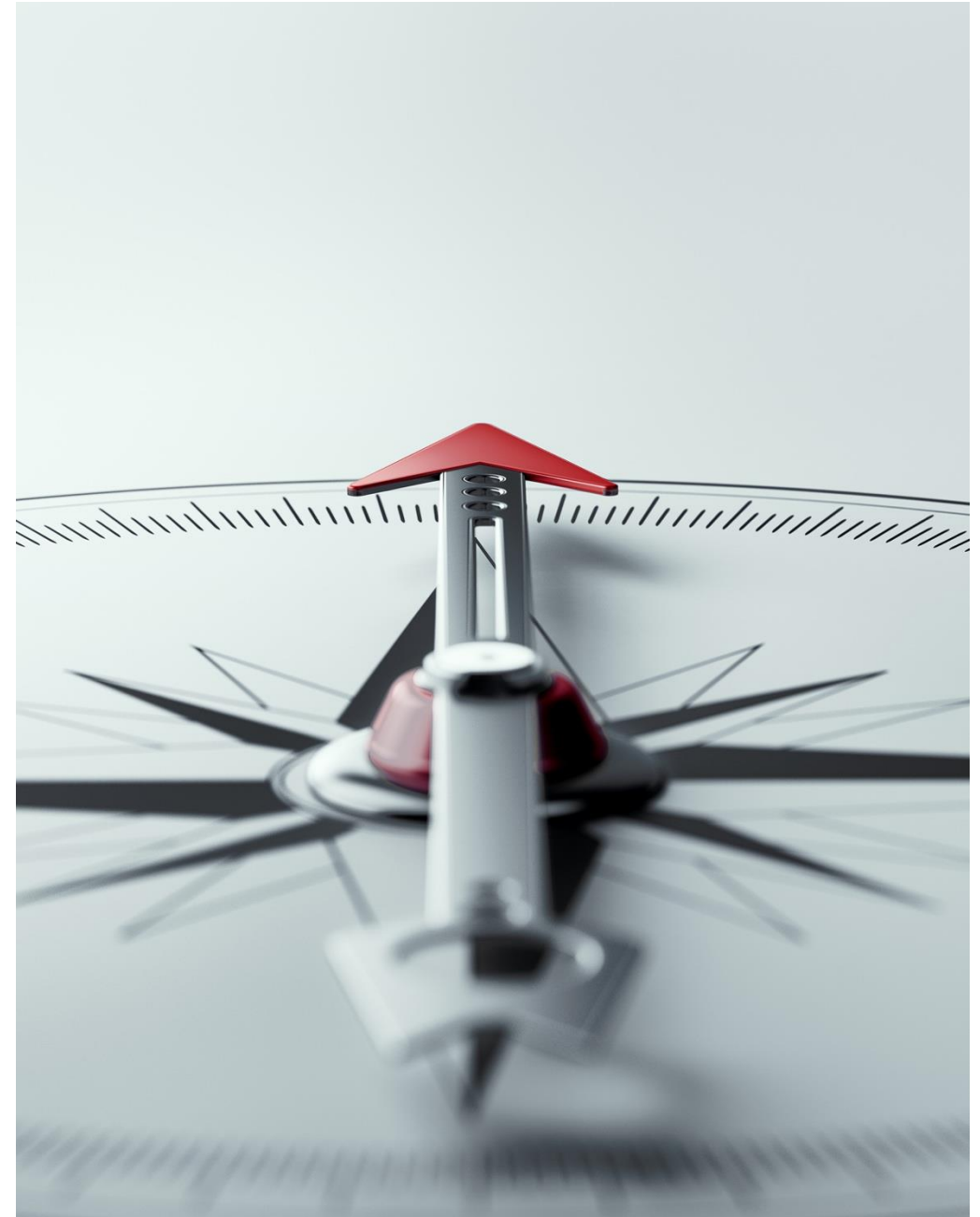




**Building blocks
organizations are
putting into place today
to succeed and thrive.**

Aligning on Mission, Vision and Values

- Mission, Vision, and Values are more than words on your website or posted to your break room.
- They are the building blocks of a successful strategic plan that can withstand the future



Driving Passionate Vision and Mission

- Why are Vision and Mission Critical?
 - ▶ Effectively communicating the organization's vision and mission is critical to achieve goals.
 - ▶ Enrolling stakeholders into a shared commonality helps unite everyone around the common goals and prevents disengagement.
 - ▶ Lack of passionate vision and mission can lead to subpar care and inferior financial stability when others aren't enrolled into them.



Creating a Strong Strategic Plan

- Your core values are the behavioral foundation of your culture. These are the non-negotiables. They set the tone for how people are expected to treat each other, make decisions, and get work done.
- Research shows that most organizations list between three and seven core values, with five being the most common number.
- This range strikes the ideal balance between clarity and depth.



**Pitfalls to avoid in the
planning process**



Pitfalls to avoid in the process

- Failure to link back to vision and mission: Attempting to develop a strategic plan without examining your statements.
 - Each organization or system is unique with its own vision and mission
- The plan is not easily understood or transferrable into individual everyday actions the team can take.
 - Rubber meets the road

Pitfalls to avoid in the process

- Creating a plan that is short-sighted and non-positional.
 - Your plan should differentiate your organization from the competition.
- Relying on perceptions or not being mindful past performance.
 - Strategies, objectives and tactics are valuable only if they are based on reality with data from impartial market analyses and a broad market view.

Pitfalls to avoid in the process

- Forgetting about your culture as a key determinant.
 - "Culture eats strategy"
 - This is what makes values to important.



**Integrating patient
experience and
community
engagement into the
plan**



Patient Experience Starts With Understanding Your Community

Patient experience doesn't begin at the point of care, it begins with understanding who your patients are as people within the community you serve.

Patients are not isolated consumers; they are members of the communities we serve.

Community context shapes expectations, access, trust, and decision-making.

High-performing organizations design experiences that reflect the realities of their patients' daily lives.

When strategy reflects community needs, patient experience becomes more human, relevant, and effective.

From Population to Person: Using Archetypes & Personas

To design meaningful patient experiences, organizations must move from broad population data to clear, actionable personas.

- Archetypes and personas translate data into human understanding.
- Personas capture motivations, barriers, behaviors, and emotional drivers.
- Archetypes and personas help teams move beyond assumptions and design with intention.
 - ▶ They align clinical, operational, and leadership teams around the same patient reality.
 - ▶ Can also influence community understanding as well as foundation and grant writing.

The Importance of Patient Journey Mapping

Once personas are defined, journey mapping allows organizations to intentionally design experiences across the full patient lifecycle.

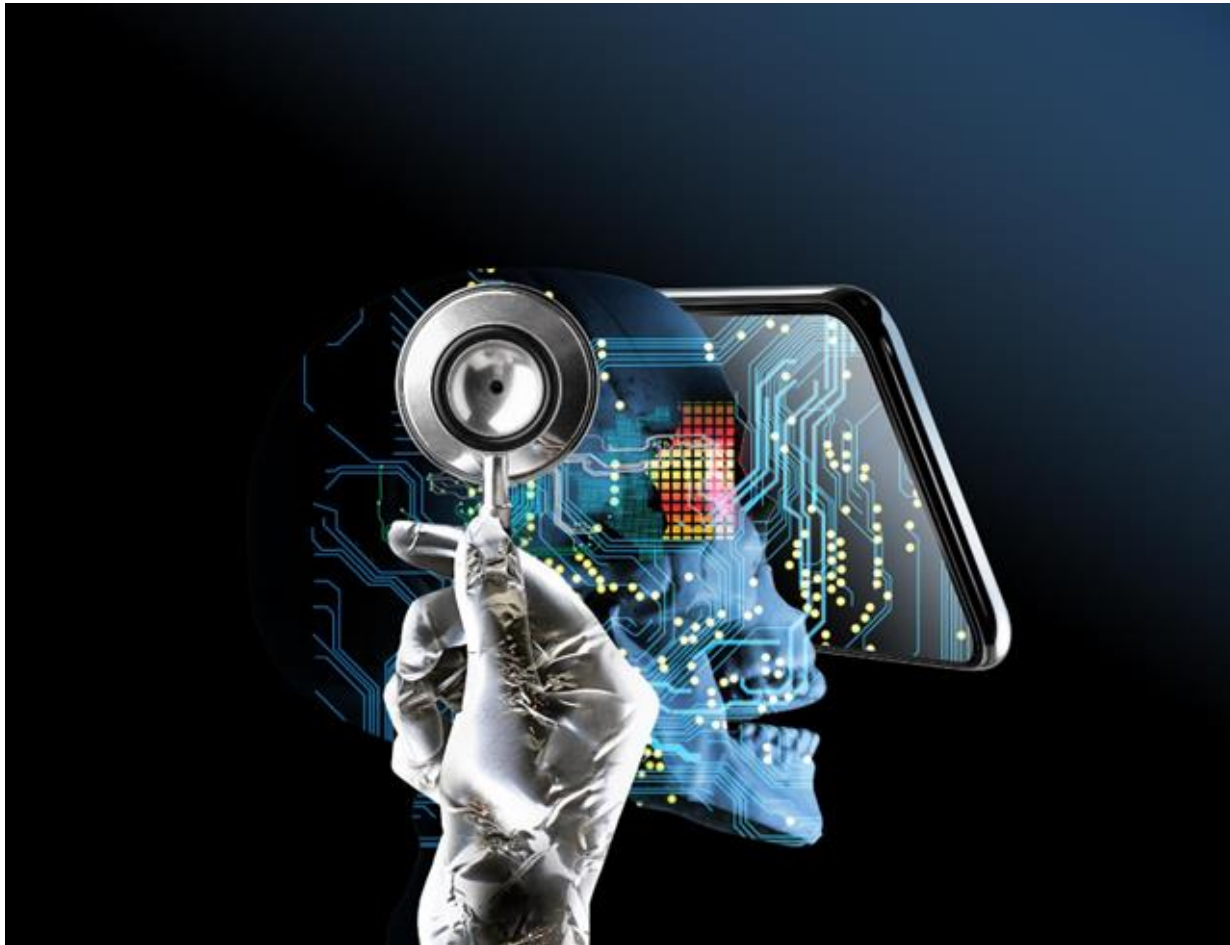
Critical to high performing health care organization is owning and curating their patient journey. Patient journey mapping, part of the PX process, is a foundational tool that leadership teams use to better understand how patients interact with the organization throughout their journey.

PX: Broader Patient Safety Concepts

A well-designed patient journey can serve to enhance achieving goals in your strategic plan by:

- **Reducing anxiety and confusion** by offering clear, compassionate communication, including post-discharge.
- **Demonstrating empathy** through foundational practices such as privacy and confidentiality, proactive counseling, and respectful handling of sensitive situations.
- **Building trust** by ensuring transparency and consistency in practices, minimizing surprises and disputes.

AI can be an effective tool for strategic planning



1. Supports data analysis and insight generation, making complex information easier to interpret and act on.
2. Scans competitors and peer organizations to identify market positioning, service offerings, and strategic differentiators.
3. Develops patient personas to bring real-life context into planning, helping teams visualize care journeys across service lines.
4. Supports preliminary risk assessment by identifying potential operational, financial, or compliance risks based on available data.



Actionable tips to drive a strong strategic plan.

Tools for Gaining Buy-in

Strategic planning requires a multi-faceted approach to achieve the best outcomes

Effective Group Meetings

Do your stakeholders understand the vision? Has the vision been made real, and our roles understood?

Gather

One-on-One Meetings

Foster dialogue across different levels of the organization. Hear voices often unheard and individuals who can provide fresh perspectives

Identify

Engage the Nay-Sayer

Avoid the desire to suppress or ignore the individual(s). Draw the critic into the process with a goal of advocacy.

Lead

Keeping everyone informed and aligned



Follow up

Follow up as the
'secret sauce'



Determine

Determine how
progress is to be
measured



Communicate

Communicate
progress



Celebrate

Celebrate success



Frame

Frame failures as
opportunities for
growth

Developing Ongoing Cadence

Keys to ongoing strategic plan cadence:

- Translate your strategies into specific tactics with measurable goals and timelines.
 - ▶ Strategies are broad approaches to meeting a goal, while tactics are specific actions needed to reach the goals.
 - ▶ A strategic plan without tactics makes it more difficult to implement the plan and achieve its goals.
 - ▶ Assign responsibilities for accomplishment of goals and tactics.

Developing Ongoing Cadence

- Explore facilitated strategic review and support
 - ▶ Ongoing, annual facilitated meetings to compare plan to results
- Technology solutions
 - ▶ Online strategic management solution that allows insights for leadership and the Board
- Conduct Culture Index Surveys
 - ▶ Measure how employees feel about working in your organization, including their opinions, attitude, and feelings about different aspects of their job
 - ▶ This often identifies where the plan will fall short...culture eats strategy...

Developing Ongoing Cadence

- Monitor Team Dynamics
 - ▶ Predictive Index, Myers–Briggs Type Indicator
- Board Governance & Training
 - ▶ Function effectively with a clear understanding not only of member governance roles and responsibilities but also how to practically and correctly apply them within a leadership context



“Planning is bringing the future into the present so that you can do something about it now.”

Alan Lakein

Questions?



ORH Announcements

Next CAH Finance and Operations Webinar | Stay tuned for more in 2026 ([Information will be updated soon here](#))

Rural Population Health Incubator Grants | Applications due Jan. 23, 2026 ([More information here](#))

May 14-15, 2026 Virtual | 3rd Annual Forum on Rural Population Health | Now accepting presentation proposals through Dec. 12. ([More information here](#))

Oct. 7-9, Bend, OR | 43rd Annual Oregon Rural Health Conference ([More information here](#))

Thank you!

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