



Arizona Coalition for Healthcare
Emergency Response - Central Region

Strategic Planning Workshop Report

March 2016



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ASSOCIATES, INC.

AzCHER - Central Region Strategic Planning Workshop Report March 2016

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About LeCroy & Milligan Associates:

Founded in 1991, LeCroy & Milligan Associates, Inc. is a consulting firm specializing in social services and education program evaluation and training that is comprehensive, research-driven and useful. Our goal is to provide effective program evaluation and training that enables stakeholders to document outcomes, provide accountability, and engage in continuous program improvement. With central offices located in Tucson, Arizona, LeCroy & Milligan Associates has worked at the local, state and national level with a broad spectrum of social services, criminal justice, education and behavioral health programs.

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Report Contents

I. Introduction and Background.....	4
Overview of the Report.....	5
II. Strategic Planning Preparation and Framework	5
Key Informant Interview Data	5
Member Survey Data.....	6
Strengths of AzCHER-Central Region	8
Challenges of the AzCHER-Central Region.....	8
III. Summary of Strategic Planning Workshop.....	9
Workshop Design.....	9
AzCHER Strategic Plan: Vision.....	10
Obstacles and Challenges	12
AzCHER-Central Region Priorities, Goals, and Strategies	15
IV. Next Steps	17
References Cited.....	20
Appendix A. Member Ratings of AzCHER-Central Region Collaboration Success Factors	21
Appendix B. Strategic Planning Workshop Agenda.....	22
Appendix C. Work Group Vision Themes and Supporting Evidence	23
Appendix D. Work Group Identified Obstacles and Challenges.....	28



List of Exhibits

Exhibit 1. Map of AzCHER-Central Region.....	4
Exhibit 2. Central Themes and Sample Supporting Quotes from Interviews with AzCHER-Central Region Members	6
Exhibit 3. Member Ratings of AzCHER-Central Region Collaboration Success Factors (Average Ratings).....	7
Exhibit 4. Three AzCHER-Central Region Vision Statements and Supporting Work Group Vision Statements.....	11
Exhibit 5. AzCHER-Central Region Obstacle and Challenge Areas and Supporting Work Group Statements	13
Exhibit 6. Priority Area 1 Infrastructure: Goals and Strategies	15
Exhibit 7. Priority Area 2 Sustainable Funding and Staffing: Goals and Strategies	16
Exhibit 8. Priority Area 3 Membership: Goals and Strategies	16
Exhibit 9. Suggested Timeline for AzCHER-Central Region to Complete Strategic Planning	19



I. Introduction and Background

The Arizona Coalition for Healthcare Emergency Response (AzCHER) works to facilitate collaboration among public health, healthcare, pre-hospital entities, and various community partners to prepare for, respond to, and recover from an emergency or disaster. The goal of AzCHER is to develop effective streams of communication and processes for resource sharing among healthcare entities throughout Arizona; so that in the event normal day-to-day operations or standard operating procedures become disrupted or overwhelmed and disaster operations become necessary, said entities can maintain effective communications, share and manage resources, and continue to deliver healthcare services. AzCHER is comprised of four regional healthcare coalitions: Central Region (Gila, Maricopa, and Pinal Counties); Northern Region (Apache, Coconino, Navajo, and Yavapai Counties); Southern Region (Cochise, Graham, Greenlee, Pima, and Santa Cruz Counties); and Western Region (La Paz, Mohave, and Yuma Counties).

Since 2009, the Office of Assistant Secretary for Preparedness and Response (ASPR) federal funding requirements have dictated that a more robust mechanism be implemented to address the challenges healthcare entities face during large scale events, epidemics, and disasters. In 2012, ASPR released the *Healthcare Preparedness Capabilities: National Guidelines for Healthcare System Preparedness* to facilitate and guide preparedness planning to build and sustain healthcare specific capabilities. The ASPR guidelines include eight capabilities as the basis for healthcare preparedness. The first capability, Healthcare System Preparedness, focuses on the development, refinement, and sustainment of healthcare coalitions.

With the release of the ASPR grant deliverable and guidelines, AzCHER partners determined the need for strategic planning to guide the coalition into an action-based and operational coalition. LeCroy & Milligan Associates was contracted in late 2015 to provide strategic planning facilitation, including a day long workshop for AzCHER-Central Region (see Exhibit 1) in February 2016, and ongoing consultation through October 2016. Due to the number of members in the Central Region, AzCHER-Central utilizes a Sector approach to enhance relationship building and overall productivity of the coalition. Sectors are based on Arizona Emergency Medical Systems (AEMS) pre-designated sectors. All Sectors of AzCHER-Central were invited to participate in this Strategic Planning Workshop.



Exhibit 1. Map of AzCHER-Central Region



Overview of the Report

This report provides a summary of the AzCHER-Central Region Strategic Planning Workshop held on February 12, 2016. This report includes a:

- Summary of workshop preparation activities, including a Member Survey and interviews, which were completed by the facilitation team to help design the workshop;
- Summary of the strategic vision determined by AzCHER-Central Region members during the Strategic Planning Workshop;
- Summary of obstacles and challenges that members identified as needing to be addressed to achieve the vision of AzCHER-Central Region;
- Overarching goals and initial strategies for the coalition over the next five years;
- A roadmap and recommendations of next steps in strategic planning; and
- Appendices of raw data generated from members before and during the workshop.

II. Strategic Planning Preparation and Framework

To better leverage the strengths of AzCHER-Central Region and effectively address the challenges and obstacles to achieving the coalition's vision, LeCroy & Milligan Associates utilized mixed-methods, information gathering strategies before determining the most appropriate format for the Strategic Planning Workshop. Strategies included: a review of the literature; a review of current documentation, and federal and state regulations; ongoing communication and meetings with high-level decision makers of AzCHER-Central Region; and collection of qualitative and quantitative data from AzCHER-Central Region members. After careful synthesis of this information, a Strategic Planning Workshop design was selected that matched the needs of the coalition and would support the successful implementation of future strategic growth activities.

Key Informant Interview Data

Interviews were completed with key informants identified by the AzCHER-Central Region Chair. Interviews took place by telephone and each lasted approximately one hour. Questions covered a range of topics about the strengths and challenges facing the coalition. A thematic analysis of interview data revealed four central themes shown in Exhibit 2. Overall, interviewees feel that coalition members are hardworking and dedicated to AzCHER-Central, yet limited progress has been made to reaching the coalition's goals. Interviewees identified concerns related to limited funding and staffing of the coalition and the need for better information and resource sharing among AzCHER-Central Region members.



Exhibit 2. Central Themes and Sample Supporting Quotes from Interviews with AzCHER-Central Region Members

Themes	Quotes from AzCHER-Central Region Members Interviewed
Hardworking, dedicated coalition members	<ul style="list-style-type: none"> • “We have some smart, committed people who have been there all along. Even people who were previously involved will be there in a heartbeat if needed” • “The individuals willing to do something within the coalition is the biggest strength.” • “A lot of long-term loyal dedicated members around for a decade.”
Limited progress	<ul style="list-style-type: none"> • “No [the coalition is not progressing towards its goals]. We lack focus. Right now it’s a lot of talk and not a lot of action.” • “No [the coalition is not progressing towards its goals]--we are questioning what our goals are. Our attendance is dropping at every meeting due to people wanting to find out what is in it for their organization.” • “When it is so hard to get even the smallest thing done, even successes feel like failures.” • “There was some big ideas we wanted to do...[but it] was not possible due to the coalition’s system of volunteers.” • “We are able to make plan sometimes and it doesn’t go anywhere.” • “People are not sure what’s going on with coalition so not much [has been] brought up the last few months.”
Funding and staffing concerns	<ul style="list-style-type: none"> • “We need more collaboration on how the funds are used and transparency on how the funds are distributed. I have heard this from coalition leads...again and again, there will be push back from the state.” • “We can’t move forward and complete grant deliverables with volunteers.” • “That high level decision makers determine where funding goes sours what everyone else is doing.” • “Lack of communication from state on funding issues.” • “In order to meet mandates, can’t do it with volunteers. We can’t meet grant deliverables like this.”
Need for better information and resource sharing	<ul style="list-style-type: none"> • “Data sets of organizational resources would be helpful.” • “Trying to build a library of information on the state portal, such as trainings, exercises posting, documents etc. would be good” • “There is not a lot of communication”

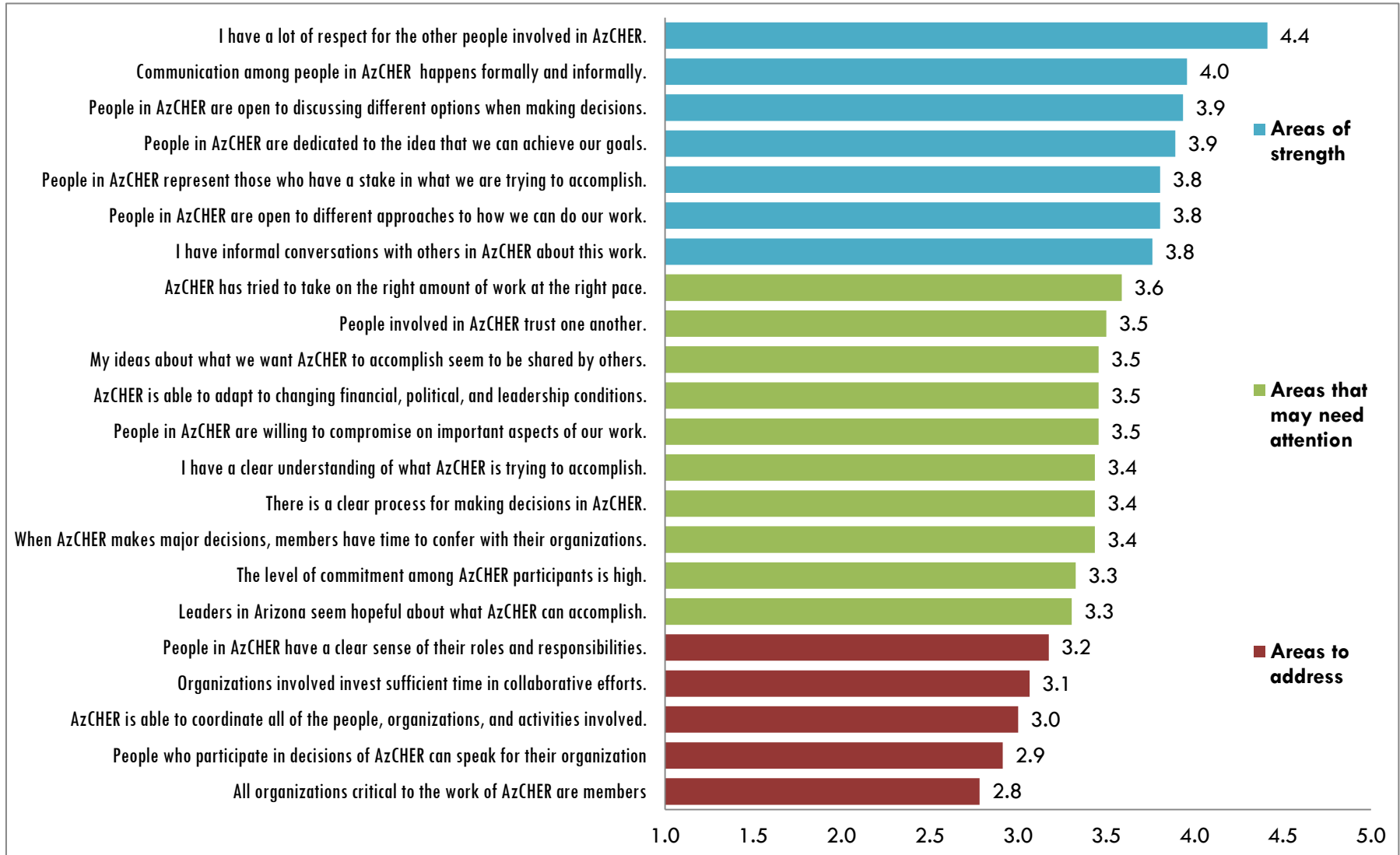
Member Survey Data

The Member Survey was adapted from the *Wilder Collaboration Factors Inventory* (Mattessich, Murray-Close, & Monsey, 2001), which is an instrument commonly used in coalition building for members to rate their coalition on elements of effective collaboration (e.g., shared vision, clear member roles, decision-making, etc.). A total of 46 AzCHER-Central Region members completed the online survey. A reliability analysis of survey data demonstrated that the survey items have a strong internal consistency, achieving a Cronbach Alpha score of .91.

Members were asked to rate AzCHER-Central Region using a 5-point scale, from strongly disagree (1) to strongly agree (5). Exhibit 3 shows average member ratings of survey items (organized from highest to lowest average rating) (see Appendix A for the percentage distribution of member ratings organized from highest to lowest agreement rating). Average member ratings in Exhibit 3 are grouped into three levels to facilitate interpretation of the results: **areas of strength** (average rating of 3.7 or higher); **areas that may need attention** (average rating of 3.3- 3.6); and **areas that should be addressed** (average rating of 3.2 or less).



Exhibit 3. Member Ratings of AzCHER-Central Region Collaboration Success Factors (Average Ratings)



Strengths of AzCHER-Central Region

AZCHER-Central Region members identified the following areas as strengths of the coalition:

- Shared mutual respect of members;
- Use of formal and informal communication strategies;
- Shared dedication to AzCHER-Central Region's goals;
- Members represent a cross section of those who have a stake in AZCHER-Central Region's mission; and
- Members' openness to discussing different options when making decisions and use of different approaches to carry out coalition work.

Challenges of the AzCHER-Central Region

Low average ratings given by members for the following areas suggest opportunities for improving AzCHER-Central Region:

- Members need a clear sense of their roles and responsibilities;
- All organizations critical to the work of AzCHER-Central Region should be members;
- Members of AzCHER-Central Region should include those with decision-making authority at their organization (i.e., senior leadership or executive level staff);
- Improved coordination of AzCHER-Central Region members and activities is needed; and
- Organizations involved in AzCHER-Central Region should invest sufficient time in collaborative efforts.

After discussing the pre-workshop data with the AzCHER-Central Region Chair and ADHS, it was agreed that there was a need to review and reaffirm a shared vision and goals using a developmental approach to planning, in addition to sharing information about best practices. It was agreed that making progress in addressing structural issues within AzCHER-Central Region would set the stage for effective development of actions and tasks to meet specific preparedness requirements. Leveraging the coalition's reported strengths in mutual trust and relationships, a participatory method of idea generation was agreed upon.



III. Summary of Strategic Planning Workshop

Workshop Design

The AzCHER-Central Region Strategic Planning Workshop was designed in collaboration with the Central Region Chair and with input from staff of the Public Health Emergency Preparedness Bureau at the Arizona Department of Health Services. Information from the pre-workshop survey and interviews was used to help determine what type of workshop structure would engage approximately 50 participants with varying backgrounds, experience and knowledge of AzCHER-Central Region. A workshop design was developed that would respond to expressed needs to clarify a shared vision and goals, examine obstacles and coalition structure, and increase understanding of best practices and models of healthcare coalitions. The workshop consisted of three key aspects: a review of the history and accomplishments of AzCHER-Central Region over the past several years, an overview of best practices and healthcare coalition models, and interactive group work designed to build consensus and co-creation of overarching goals for the Coalition. The history and background of AzCHER-Central Region was provided by the current and past AzCHER-Central Region chairs. An additional resource person for the day was a guest participant, a healthcare coalition chair from the state of Washington, who provided perspectives on the evolution of the Washington coalition.

The Technology of Participation (ToP) and Focused Conversation methods developed by the Institute for Cultural Affairs were utilized for group work facilitated by a team of LeCroy & Milligan Associates consultants. (Spencer, 1989; Stanfield, 2000). Throughout the day, five steps of the ToP method were conducted: (1) set the context for the discussion with the use of a Focus Question; (2) brainstorm data and ideas; (3) order the data into categories based on similarity of content; (4) name the categories so that concepts are easily understood; and (5) evaluate the work and its implications. These methods allow for all voices to be heard quickly and for consensus to be reached. For each Focus Question, the 50 participants broke into 4 workgroups to generate ideas, and then workgroups rejoined in full plenary to organized and gain consensus as a large group.

The goals for the initial Strategic Planning Workshop were to:

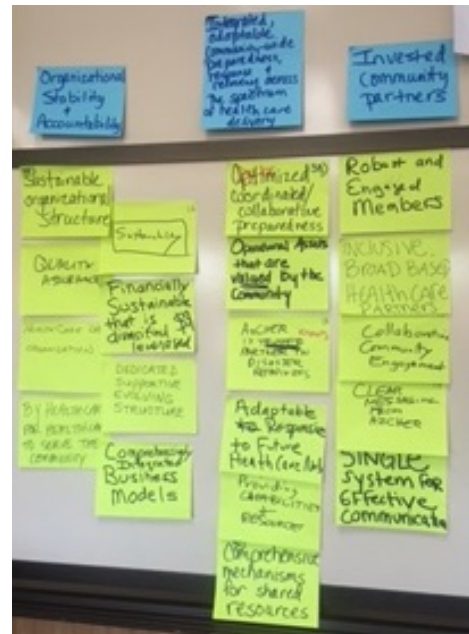
- ▶ Examine and discuss the history, background and vision of AzCHER-Central Region.
- ▶ Form a shared five year vision for AzCHER-Central Region.
- ▶ Explore obstacles that need to be resolved in order to realize the shared vision for AzCHER-Central Region.
- ▶ Identify innovative and energizing key goals and strategies to include in the Strategic Plan.
- ▶ Identify next steps in the development of a Strategic Plan.

See Appendix B for the Strategic Planning Workshop Agenda.



AzCHER Strategic Plan: Vision

The first activity of the Strategic Planning Workshop focused on defining a five year vision for AzCHER. The Vision focus question was: *“Given the information on the history and mission of AzCHER-Central Region, best practices, coalition models, and your knowledge and experience, what do you see in place 5 years from now for AzCHER-Central Region?”* Using post-it notes, work group members recorded, discussed and organized individual ideas into overarching vision themes (raw data for this visioning exercise is available in Appendix C). Each workgroup then presented their vision themes to the large group and the large group agreed on three overarching visions for AzCHER-Central Region’s work over the next five years. Exhibit 4 shows the three vision statements developed and agreed upon by the large group. **In five years from now, members envision AzCHER-Central Region as having:**



1. **Organizational stability and accountability;**
2. **An integrated and adaptable community-wide preparedness, response, and recovery system across the spectrum of healthcare delivery; and**
3. **Invested community partners.**



Exhibit 4. Three AzCHER-Central Region Vision Statements and Supporting Work Group Vision Statements

<h2 style="text-align: center;">AzCHER-Central Strategic Planning Vision Statements</h2> <p style="text-align: center;"><i>Focus Question: In five years from now, what is the vision for AzCHER-Central?</i></p>				
Supporting Work Group Vision Statements	1) AzCHER has achieved organizational stability and accountability	2) AzCHER has developed an integrated and adaptable community-wide preparedness, response, and recovery system across the spectrum of healthcare delivery	3) AzCHER has invested community partners	
		<ul style="list-style-type: none"> AzCHER has a sustainable organizational structure 	<ul style="list-style-type: none"> AzCHER ensures optimized, coordinated, and collaborative community preparedness 	<ul style="list-style-type: none"> AzCHER supports collaborative community-wide engagement of all healthcare partners
		<ul style="list-style-type: none"> AzCHER is a healthcare-led organization 	<ul style="list-style-type: none"> AzCHER operations are valued by the community 	<ul style="list-style-type: none"> AzCHER membership is inclusive and broad-based of partners that span the spectrum of healthcare delivery
		<ul style="list-style-type: none"> AzCHER utilizes comprehensively integrated business models 	<ul style="list-style-type: none"> AzCHER is a trusted, known partner in disaster readiness 	<ul style="list-style-type: none"> AzCHER membership is robust and equally engaged
		<ul style="list-style-type: none"> AzCHER has a dedicated, supportive, and evolving structure 	<ul style="list-style-type: none"> AzCHER is adaptable and responsive to future healthcare needs 	<ul style="list-style-type: none"> AzCHER utilizes of clear communications plan to support collaborative efforts
		<ul style="list-style-type: none"> AzCHER has diversified and leveraged financial sustainability 	<ul style="list-style-type: none"> AzCHER coordinates and provides members with training, coordination, support, and resources 	<ul style="list-style-type: none"> AzCHER utilizes a single system for effective emergency communication
	<ul style="list-style-type: none"> AzCHER utilizes quality assurance monitoring processes and systems to evaluate the quality of the work 	<ul style="list-style-type: none"> AzCHER provides comprehensive mechanisms for sharing resources among members 		



Obstacles and Challenges

The information gathered before the workshop showed that obstacles and challenges have been impeding the work of AzCHER-Central Region. Therefore, a participatory strategy was utilized in the Strategic Planning Workshop to engage members in identifying the most critical challenges and obstacles that hinder progress toward their vision. This approach assures that effective goals are those that directly target prioritized challenges. The focus question for this process was: *“What obstacles or roadblocks obstruct the realization of our Vision?”*

Members worked in small groups to discuss and analyze obstacles and prioritize their top issues. Workgroups reconvened in plenary session to share perspectives and reach consensus on the top three challenges to address with goals. The most critical challenges to address were:

- Lack of effective infrastructure to sustain and carry out Coalition activities;
- Lack of sustainable funding and staffing to carry out Coalition goals and strategies effectively; and
- Need for more diverse and invested membership.

Exhibit 5 provides a comprehensive list of challenges grouped by themes. Within each column, the sub-themes in bold were identified by the work groups and the n value represents the total number of work group members’ challenge statements included within each sub-theme. Example challenge statements are bulleted under each sub-theme. See Appendix D for work group identified obstacles and challenges.



Obstacles and Challenges to Achieving AzCHER-Central's Vision

Focus Question: What Obstacles or roadblocks obstruct the realization of our Vision?

Lack of Sustainable Funding and Staffing	Need for more Diverse and Invested Membership	Purpose/Vision	AzCHER Members are Driven by Grant Requirements Instead of Real World Needs	Need for More Effective Communication and Outreach	Lack of Executive Level Buy-in/ Competing Agendas
<p>Lack of funding (n=10)</p> <ul style="list-style-type: none"> • Lack of consistent funding is a barrier to operational stability • Lack of stable and increased funding 	<p>Poor participation leads to poor performance (n=4)</p> <ul style="list-style-type: none"> • Not all health systems are involved • Not all partners and stakeholders are engaged 	<p>Need for Process and Structure for building consensus/competing agendas (n=2)</p> <ul style="list-style-type: none"> • The vision is not unified • Priorities are not shared 	<p>Need investment in AzCHER beyond compliances and based on real world needs and capabilities (n=4)</p> <ul style="list-style-type: none"> • Too much focus on HPP grant deliverables instead of community needs • Need “boots on the ground” to obtain long term goals 	<p>Lack of communication message leads to lack of investment (n=2)</p> <ul style="list-style-type: none"> • Need a clear messaging campaign; visionary message • Obscurity, not connected to community 	<p>Need for Goals and Strategies for Leadership Buy-in/Address Competing Agendas (n=22)</p> <ul style="list-style-type: none"> • Lack of executive healthcare investment in AzCHER • Market competition leads to lack of CEO buy-in • Organizational agendas vs AzCHER agenda
<p>Lack of staffing (n=2)</p> <ul style="list-style-type: none"> • Lack of staffing/Infrastructure • AzCHER members have real jobs too 	<p>Need for Expansion of Membership (n=5)</p> <ul style="list-style-type: none"> • Staff turnover • Unclear expectations of small or non-hospital partners • Meeting the needs of diverse partners • Time investment 	<p>Loss of momentum (n=2)</p> <ul style="list-style-type: none"> • Loss of momentum / no follow through • Apathy 	<p>Choice of deliverables is made in absence of input from real world needs (n=3)</p> <ul style="list-style-type: none"> • Direction vs. joint decisions; told deliverable vs. deciding vs. what is needed 	<p>ROI/Market competition leads to lack of CEO buy-in (n=1)</p> <ul style="list-style-type: none"> • Partial, unclear communication between partners 	<p>ROI/Market competition leads to lack of CEO buy-in (n=7)</p> <ul style="list-style-type: none"> • Need for senior leadership investment ROI • Monetary commitment of healthcare CEOs to AzCHER vision



Obstacles and Challenges to Achieving AzCHER-Central's Vision

Focus Question: What Obstacles or roadblocks obstruct the realization of our Vision?

Lack of Sustainable Funding and Staffing	Need for more Diverse and Invested Membership	Purpose/Vision	AzCHER Members are Driven by Grant Requirements Instead of Real World Needs	Need for More Effective Communication and Outreach	Lack of Executive Level Buy-in/ Competing Agendas
	<p>Need for Process and Structure for building consensus/competing agendas (n=2)</p> <ul style="list-style-type: none"> • Corporate structures of organizations partner (ROI) trust/competitive • Partners located across regions (belonging to multiple coalitions) 	<p>Poor participation leads to poor performance (n=2)</p> <ul style="list-style-type: none"> • Lack of clear path forward • Lack of clear purpose 			<p>Need for Process and Structure for building consensus/Competing agendas (n=2)</p> <ul style="list-style-type: none"> • Corporate structures of organizations partner (ROI) trust/competitive • Managing potential partners <p>Lack of Metrics (n=1)</p> <ul style="list-style-type: none"> • No clear metrics to show value



AzCHER-Central Region Priorities, Goals, and Strategies

After identifying the vision statements and obstacles to achieving the vision, three priority areas emerged, as well as goals and strategies that will address the most critical obstacles to the vision. The three priority areas are: 1) Infrastructure, 2) Sustainable Funding and Staffing, and 3) Membership. These priorities reflect a need for AzCHER-Central Region to address structural and foundational work. Based on these priorities, smaller work groups developed two to four goals and strategies. Priority areas, goals, and strategies developed by participants of the Strategic Planning Workshop are shown in Exhibits 6 through 8. Future planning meetings should be devoted to identifying specific action steps and timelines to achieve these goals. It is noteworthy that there was some crossover between groups, with more than one group addressing the same issue, which emphasizes their importance. Thus, actions steps may support multiple goal areas.

Exhibit 6. Priority Area 1 Infrastructure: Goals and Strategies

Priority Area 1) Infrastructure	
Goals	Strategies
Goal 1-1: Develop AzCHER-Central Region's governance structure	1-1a. Establish and engage an advisory board
	1-1b. Establish work groups
Goal 1-2: Establish an administrative home for AzCHER-Central Region	1-2a. Identify and timeline steps for an admin home (short – long term)
	1-2b. Research and identify structure of other coalitions (U.S.)
	1-2c. Determine best structural match for AzCHER-Central Region
Goal 1-3: Build a staffing structure for AzCHER-Central Region to meet coalition needs, based on available (or future) funding.	1-3a. Identify funding for staffing
	1-3b. Identify needs of the coalition – Admin, PR, member management
	1-3c. Prioritize needs and match with available or future funds
	1-3d. Identify staffing options: FTE, PTE, Interns, contractors, volunteers
	1-3e. Train leadership team – facilitation



Exhibit 7. Priority Area 2 Sustainable Funding and Staffing: Goals and Strategies

Priority Area 2) Sustainable Funding and Staffing	
Goals	Strategies
Goal 2-1: Develop a 3-5 year funding model to support AzCHER-Central Region	2-1a. Identify funding sources
	2-1b. Identify options for funding
	2-1c. Prioritize expenses / establish budget
	2-1d. Determine feasibility of long-term commitment
Goal 2-2: Develop a business plan for AzCHER-Central Region	2-2a. Establish a task force to develop the business plan based on the vision of AzCHER-Central Region
Goal 2-3: Identify fiscal agent to support AzCHER-Central Region's operation	2-3a. Taskforce researches pros and cons of different agencies acting as fiscal agent
Goal 2-4: Build a staffing structure to meet AzCHER-Central Region's needs, based on available (or future) funding.	2-4a. Identify funding for staffing
	2-4b. Identify needs of the coalition – Admin, PR, member management
	2-4c. Prioritize needs and match with available or future funds
	2-4d. Identify staffing options: FTE, PTE, Interns, contractors, volunteers
	2-4e. Train leadership team – facilitation

Exhibit 8. Priority Area 3 Membership: Goals and Strategies

Priority Area 3) Membership	
Goals	Strategies
Goal 3-1: Demonstrate value & ROI of participation in AzCHER-Central Region to gain executive leadership buy-in and support.	3-1a. Identify leader values (focus groups, etc.)
	3-1b. Identify metrics (cost benefit analysis)
Goal 3-2: Educate and reshape expectations of executive leadership to gain their buy-in and support.	3-2a. Creating a toolbox that presents a consistent message of coalition value (talking points)
	3-2b. Advocacy for the importance/value of local collaboration (marketing)



IV. Next Steps

The objective of the AzCHER-Central Region Strategic Planning Workshop was to enable a successful launch of strategic planning activities to be completed throughout the next three to five years. The final result of these activities will be a clear and measurable plan that will meet each of the requirements of emergency preparedness coalitions, as outlined by Office of Assistant Secretary for Preparedness and Response (ASPR) national guidelines.

Based on the Goals and Strategies that members developed during the Strategic Planning Workshop (see Exhibits 6-8), members feel that AzCHER-Central Region needs to undertake steps to achieve a more stable organizational infrastructure and identify and implement an appropriate business model. In addition to this foundational, AzCHER-Central Region can develop goals and strategies to meet the specific capabilities and requirements of healthcare emergency preparedness coalitions. The following is a suggested roadmap for next steps to complete the **AzCHER-Central Region Strategic Plan based on the input gained during the planning workshop**. These steps can be a focus for the Leadership Team to consider, refine and develop a timeline of activities for the year ahead. To complete a comprehensive strategic plan document in the next 6-8 months, the Leadership Team and Work Group Chairs will need to invest time in this planning process (if Work Groups are the adopted model for planning). Some activities of the roadmap will overlap temporally.

1. AzCHER-Central Region Leadership Team:

- Reviews Strategic Planning Workshop report;
- Considers formation of an Advisory or Executive Board of high level leaders;
- Determines work group structure, end product, and timeline;
- Determines how LMA can support workgroups;
- Finalizes the coalition's governance structure, based on new information; provided at the workshop; and
- Identifies business model options.

2. AzCHER-Central Region organizes (at minimum) a Work Group dedicated to each of the three goals areas and identifies Work Group Chairs. The Leadership team, along with Work Group Chairs, determines how the end product(s) should be structured so that there is consistency in documents and processes across Work Groups. Work Groups include:

- Sustainable Funding and Staffing Work Group;
- Membership Work Group; and
- Infrastructure Work Group.



3. **AzCHER-Central Region Sectors prioritize 2-3 capabilities each year to focus on and form action plans for their regions.**
 - Leadership Team and Sector Chairs engage critical decision-makers;
 - Sector Chairs coordinate and collaborate as appropriate on their action plans (through the Leadership Team); and
 - Sector Charis develop a strategy to measure progress towards the capabilities.

4. **AzCHER-Central Region Leadership Team develops sections of the strategic plan document. Some of these sections have been addressed in the first workshop and are presented in this report. Additional deliverables will be completed as the Work Groups develop action plans over the next 6 months. The strategic plan document will include:**
 - A description of the goals identified by the Coalition through the Strategic Planning process;
 - Revised mission and vision statements;
 - A description of shared values;
 - An updated governance map;
 - A description of membership strengths and gaps, including a desired membership list;
 - A clearly articulated outreach strategy to increase participation, awareness and understanding of the return on investment for participants;
 - Activities and timelines to become a functional healthcare coalition;
 - And action steps, implementers, benchmarks for all strategies developed during workshop

Suggested support from LMA:

- Meeting facilitation and coordination
- Leadership development and advising
- Document production

LeCroy & Milligan Associates is contracted to provide one-hour coordination and consultation phone calls and an additional 5 hours of monthly document development and project coordination hours through October 2016. This consultation can be used to help guide, support, facilitate and advise workgroups as they progress. Exhibit 9 provides a timeline of overall strategic planning activities to be completed in 2016, as requested by ADHS. This timeline may be revised based on information from the AzCHER-Central Region leadership about preferences and time available for addressing the deliverables and related strategic planning work tasks.



Exhibit 9. Suggested Timeline for AzCHER-Central Region to Complete Strategic Planning

Planning Deliverables	Completion Status	3/16	4/16	5/16	6/16	7/16	8/16	9/16	10/16
Vision Statements	√								
Identification of Key Goals and Strategies	√								
Mission statement		x							
Shared values		x							
Governance mapping			x						
Desired membership list			x						
Outreach strategies				x					
Activities and timelines to become a functional healthcare coalition				x					
*Action steps, implementers, benchmarks for all strategies developed during workshop					x	x	x	x	x

*These are not deliverables but are important to be developed soon to ensure follow-through for the strategic planning process.



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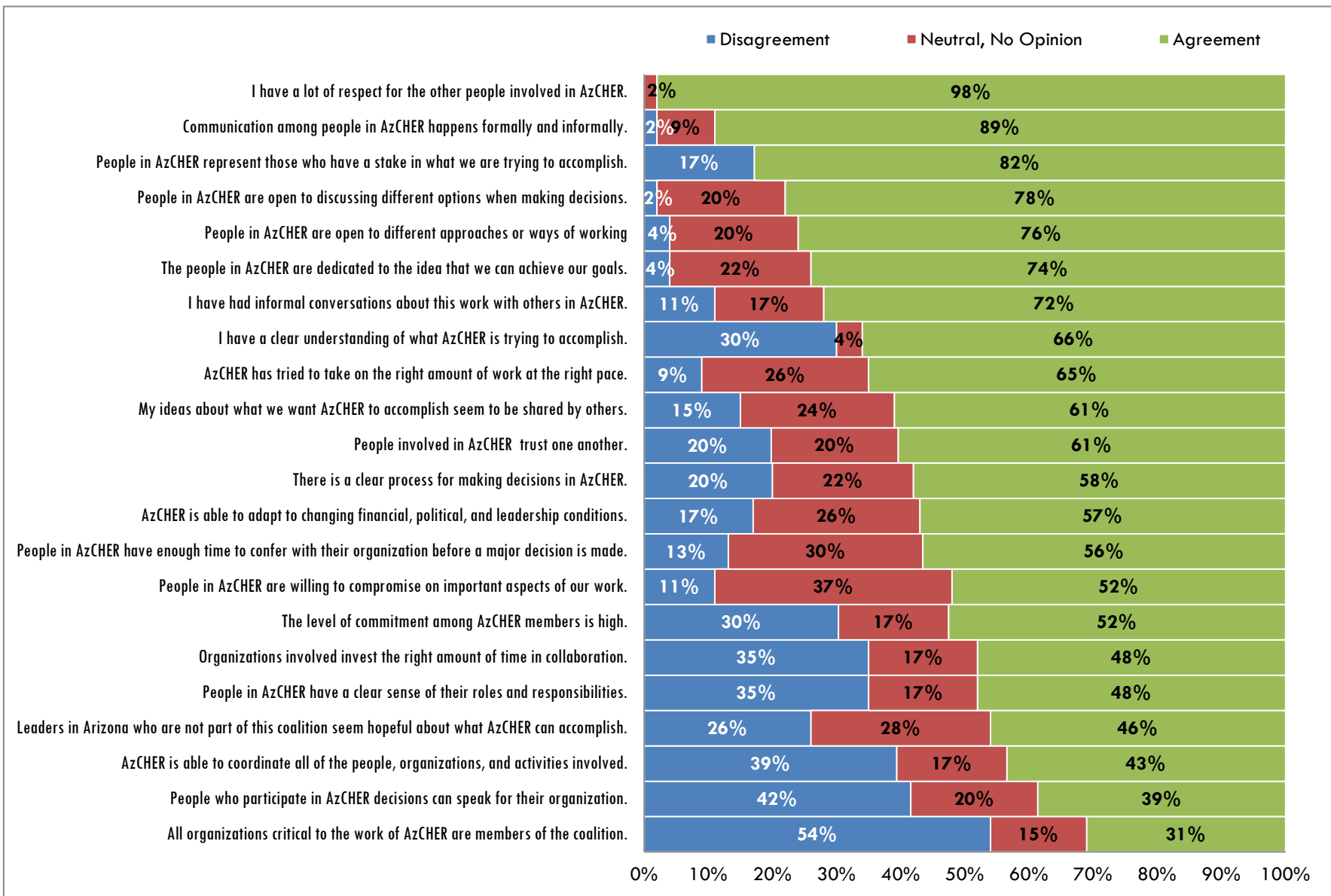
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Appendix A. Member Ratings of AzCHER-Central Region Collaboration Success Factors



Appendix B. Strategic Planning Workshop Agenda

**Arizona Coalition for Healthcare Emergency Response (AzCHER)
Central Region Strategic Planning Workshop
Friday - February 12, 2016 8:30am – 4:30 pm**

Black Canyon Conference Center 9440 N 25th Ave, Phoenix, Arizona 85007

<u>Time/Location</u>	<u>Topic</u>
7:30 am – 8:30 am	Registration
8:30 am – 9:00 am (ballroom)	Welcome and Introductions <ul style="list-style-type: none"> • Jennifer Hamilton, AzCHER Central Chair, Mayo Clinic • Teresa Ehnert, Arizona Department of Health Services • Kerry Milligan, Facilitator, LeCroy & Milligan Associates
9:00 am – 9:10 am (ballroom)	Workshop Goals and Objectives
9:10 am – 10:15 am (ballroom)	Background and Context of AzCHER Central Region Promising Practices Strategic Planning Frameworks
10:15 am – 10:30 am	Morning Break
10:30 am – 11:30 am (ballroom)	Reflections and Response from Background and Context Presentation Vision for the future
11:30 am - 12:30 pm	Working Lunch and table discussions
12:30 pm – 1:10pm (breakout rooms)	Workgroup Session I Analyzing challenges and contradictions to vision
1:10 pm – 1:45 pm (ballroom)	Brief Back Workgroup Session I <ul style="list-style-type: none"> • Organize Main Themes • Setting the stage for Strategic Work Groups
1:45 pm – 2:30 pm (breakout rooms)	Workgroup Session II <ul style="list-style-type: none"> • Strategic Work Groups • Identifying Strategic Goals
2:30pm- 2:45 pm	Afternoon Break
2:45 pm – 3:15 pm (Breakout rooms)	Work Group Session II, continued <ul style="list-style-type: none"> • Identifying Strategies
3:15 pm -4:00 pm (ballroom)	Report out Work Group Session II <ul style="list-style-type: none"> • Report on Key goals and Strategies by each group • Sector considerations • Recommendations for next steps
4:00 pm – 4:30 pm (ballroom)	Next Steps and Closing Remarks <ul style="list-style-type: none"> • Questions and future steps • Workshop evaluation



Appendix C. Work Group Vision Themes and Supporting Evidence

Focus Question: Given the information on the history and mission of AzCHER central, the best practices, coalition models, and your knowledge and experience, what do you see in place 5 years from now for Central Region AzCHER?

Vision Statement 1) Organizational Stability and Accountability

Sustainable Organizational Structure

- 501 ©3 formed with sustainable funding
- 501c3 incorporation
- Nonprofit status
- Self-sustaining model
- Self-sustaining organization
- Regional recognition by stakeholders
- Better incentives for membership (i.e. money for credentials / cert. training)
- Dedicated staffing (non-volunteer)
- Staffing infrastructure FTE's

Healthcare Led/By Healthcare For Healthcare to Serve the Community

- Self-aware
- Integrated system
- Greater integration throughout the system

Sustainability

- Cohesive vision and structure
- Self-sustaining work
- Sustainable funding sources
- To be self-sustaining
- Independent and stable as an organization
- Stable funding sources
- Funding to Sustain Efforts

Financially Sustainable that is Diversified and Leveraged

- Wildly successful, healthcare owned and driven, financially sustainable, highly engaged coalition, healthcare providers across the provider spectrum
- Diversified and leveraged funding
- Metric driven
- Strong ROI
- OBC (ACA) and HC changes



- Teresa to give us more cash
- Self-sustaining
- Staffed roles part time/full time

Dedicated Supportive Evolving Structure

- Full time staff (2)
- Funding stream
- Self-sustaining
- Solid operations
- Paid staff

Comprehensive Integrated Business Models

- Annual goals that are planned and met (e.g. training exercise)
- Healthcare corps enculturation
- Nationally recognized
- Goal and objective driven
- Independent
- All hazards
- Politically neutral
- Output focused

Quality Assurance

- Continuous measurement of goals and achievements
- Preparedness gaps are continuously identified and addressed

Vision Statement 2) Integrated, Adaptable Community-wide Preparedness, Response, and Recovery Across the Spectrum of Healthcare Delivery

Optimized Coordinated / Collaborative Preparedness

- Coordinate with other like organizations
- Collaborative training and exercise
- Coordinated community wide exercises
- Collaboration on training, education and exercises
- Development of a comprehensive but not complicated emergency management capability assessment program
- Optimized membership
- Individuals
- Partnerships between facilities
- Hospital, LTC, Assisted living
- Expansion in participation (other provider types, organizations)



Operational Assets that are Valued by the Community

- Operational during a response (staff / resources)
- Shared / clear understanding of ROI
- Regional Asset
- Valued Asset for community / PH
- Integrated system

AzCHER is Trusted, Known Partner in Disaster Readiness

- Engagement of senior leadership/buy-in to AzCHER
- Trust/dedication
- Dedicated staff controlled by AzCHER
- Recognized entity
- Greater buy-in and education by hospital senior leaders
- Trust
- Transparent, joint decision making regarding budget
- Known to public as THE resource

Adaptable and Responsive to Future Healthcare Needs

- Education opportunities for members
- Educational opportunities for staff

Providing Capabilities and Resources

- Training Resource
- Exercise realistic scenarios and incidences
- Coordination of services
- Coordinated response
- Logistical support
- Joint exercises for response to potential events
- Greatly improved education to member organizations on preparedness plans and coordination plans
- Identified resources and a system/process in place to share information

Comprehensive Mechanisms for Shared Resources

- Streamlined practices process for resource requests
- Resource typing
- Standardized resources (EOP, HVA, Checklists, MOU = EMAC Model)
- Formalized Mutual - Aid system (similar to FD/EMS/Law Enforcement)



Vision Statement 3) Invested Community Partners

Robust and Engaged Members

- Increased membership
- Increased, consistent membership
- All inclusive
- Membership buy in
- Nontraditional healthcare partners
- Shared burden of workload
- More meetings in East Valley
- AzCHER setting best practices and facilitating community based planning, exercises and training for the healthcare community
- Age of population and healthcare needs
- Mobile integrated health care

Inclusive Broad-based Healthcare Partners

- Integration of missing partners (A/F)
- Broad base of membership
- Community based membership
- Multi-disciplinary planning, training and exercise

Collaborative Community Engagement

- Non-hospital healthcare partner participation (LTC, urgent care, health centers)
- Fully engaging all healthcare entities
- Collaboration among all healthcare providers
- Resource request process solidified and partners incorporated
- Inclusion of behavioral health
- Improved partnership with the state
- To be a centralized resource for healthcare partners
- Public/private community involvement
- Multi-jurisdictional
- Work synergy between facilities and other partners (public health, EM, Fire, Police, etc.)

Clear Messaging from AzCHER

- Clear open communication
- Communication flow – a plan that incorporate all partners. scalable
- Enhanced communication among AzCHER partners
- Effective and efficient communication system
- One clear concise message from partners (same organization, same message)
- Cohesive, consistent, understanding/ shared mental model
- Shared vision



- Continue to build develop on going journey; keeping pace

Single System for Effective Communication

- Emergency notification
- Single system for effective communication
- Aligned communications



Appendix D. Work Group Identified Obstacles and Challenges

Focus Question: “What obstacles or roadblocks obstruct the realization of our Vision?”

Loss of Momentum

- Loss of momentum / no follow through
- Plateau, not evolving

Lack of Staffing (Time, Turnover)

- Lack of staffing/infrastructure
- Staff turnover
- Organizational staff turn over
- Time investment

Need investment in AzCHER beyond compliances and based on real world needs and capabilities

- Too much focus on HPP grant deliverables instead of community needs
- Investment beyond compliance requirements
- Regulatory requirements – unfunded mandates
- Apathy

Choice of deliverables is made in absence of input from real world needs

- Boots on the ground, obtainable goals
- Direction vs. joint decisions; told deliverable vs. deciding vs. what is needed
- Need investment in AzCHER beyond compliance and based on needs and capabilities
- Compliance drives participation not real world need

Lack of communication message leads to lack of investment

- Need a communication campaign, visionary message
- Obscurity, not known in community

Funding/No money, no mission

- Funding (2)
- Lack of financial support
- \$ (2)
- Funding source
- Fragmented vs. collected funds
- Lack of stable and increased funding
- Lack of consistent funding is a barrier to operational stability
- Uncertain transitional funding



Poor participation leads to poor performance

- Not all health systems are at the table
- Not all partners and stakeholders are engaged
- Some partners are afraid of their gaps to seek help (intimidated, don't further engage)
- Too small of a group of advocates
- Lack clear path forward
- Lack clear purpose

ROI/Market competition leads to lack of CEO buy-in

- Partial, unclear communication between partners
- Monetary commitment of healthcare CEOs to AzCHER vision
- Egos, priorities can't be set
- Politics

Need for Process and Structure for building consensus/Competing agendas

- Corporate structures of organizations partner (ROI) trust/competitive
- Priorities that are not shared
- Number of potential partners (managing)
- Partners located across regions (belonging to multiple coalitions)
- The vision is not unified

Need for Goals and Strategies for Leadership Buy-in/Address Competing Agendas

- Lack of exec HC investment
- Lack of awareness on the part of executives of the value of AzCHER
- Lack of clear understanding & communication of value
- Executive buy-in
- Lack of unified awareness of mission and vision of AzCHER
- Market competition leads to lack of CEO buy-in
- Lack of communication message leads to lack of investment
- ROI proof
- Market competition prevents transparency on some issues
- Educate executives / leaders shape expectations
- What ROI is important?
- What tools do we need to learn priorities of leaders?
- Focus group executive branch. What do they want?
- Who do they listen to?
- Market competition leads to lack of CEO buy-in
- Leadership buy-in investment
- Need for senior leadership investment ROI
- Need for corporate support based on ROI
- Need for corp. leadership education / info



- Lack of / need for buy-in
- Leadership buy-in investment
- Agendas
- Unclear and/or competing expectations
- There are differing agendas among stakeholders
- Organizational agendas vs AZCHER agenda
- Competition at organization administration

Lack of Metrics

- No clear metrics to show value

Need for Expansion of Membership

- Unclear expectations of small or non-hospital partners
- Meeting the needs of diverse partners

