

Strategic Planning For Clinical Engineering Departments: Step by Step Guide

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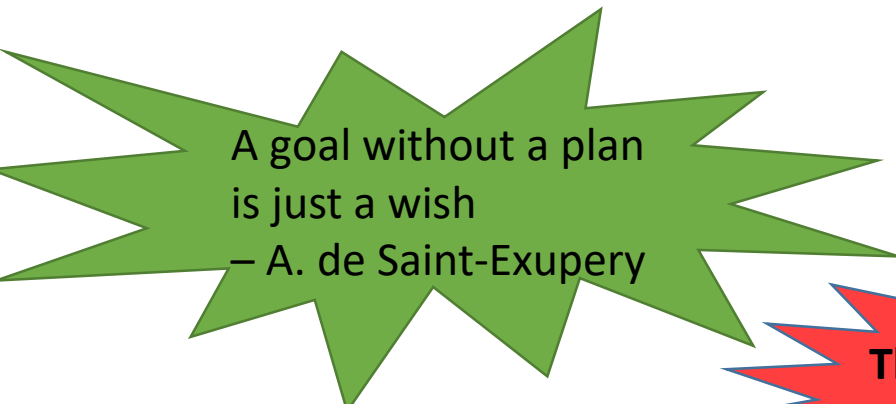
Director, Clinical Engineering

Penn State Health

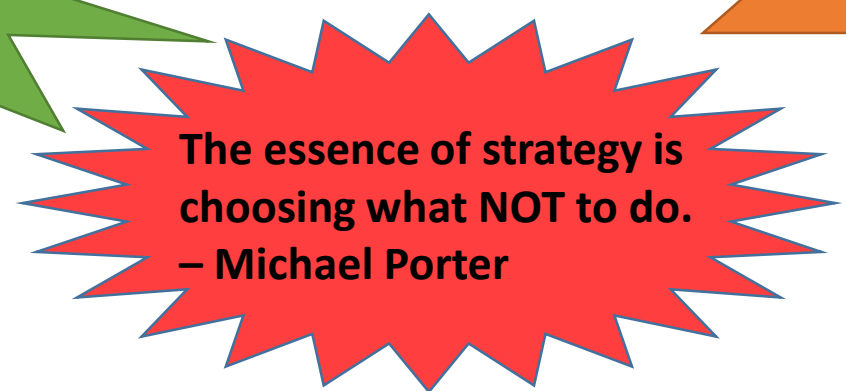


PennState Health

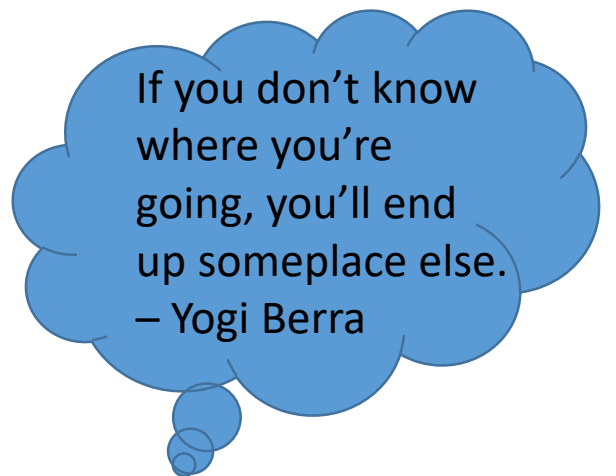
Why Strategic Planning?



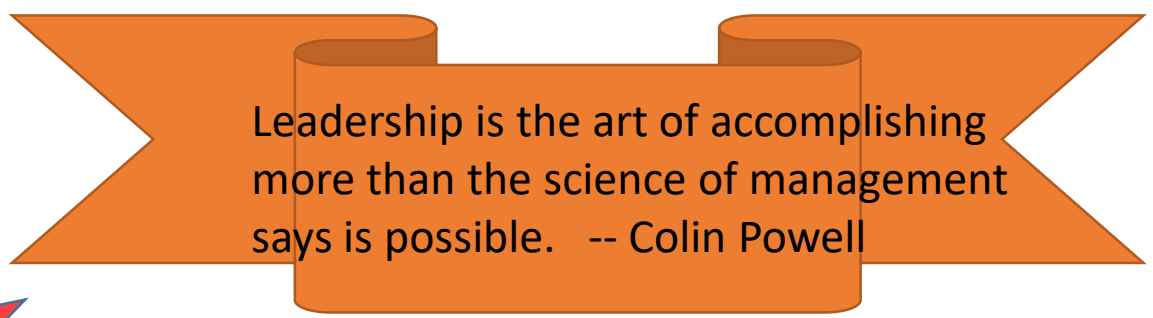
A goal without a plan
is just a wish
– A. de Saint-Exupery



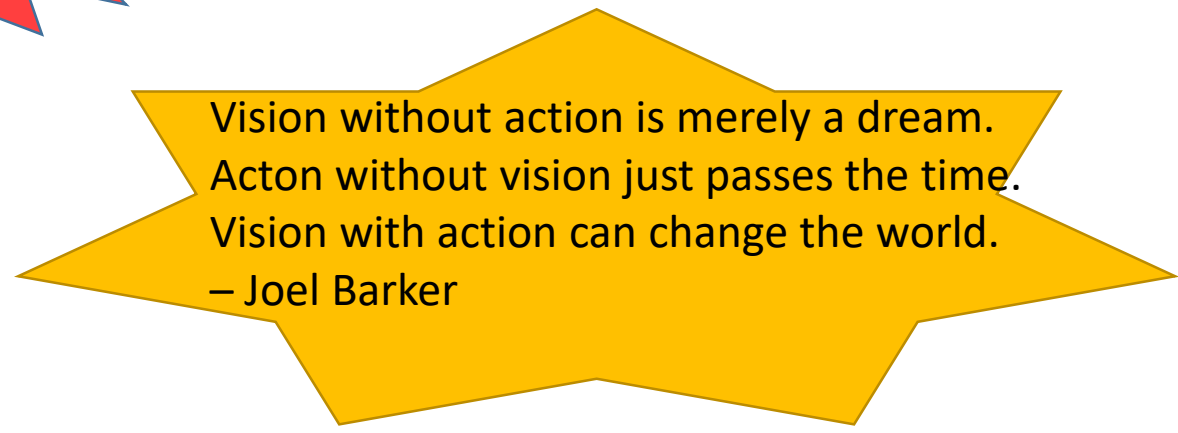
**The essence of strategy is
choosing what NOT to do.**
– Michael Porter



If you don't know
where you're
going, you'll end
up someplace else.
– Yogi Berra



Leadership is the art of accomplishing
more than the science of management
says is possible. -- Colin Powell

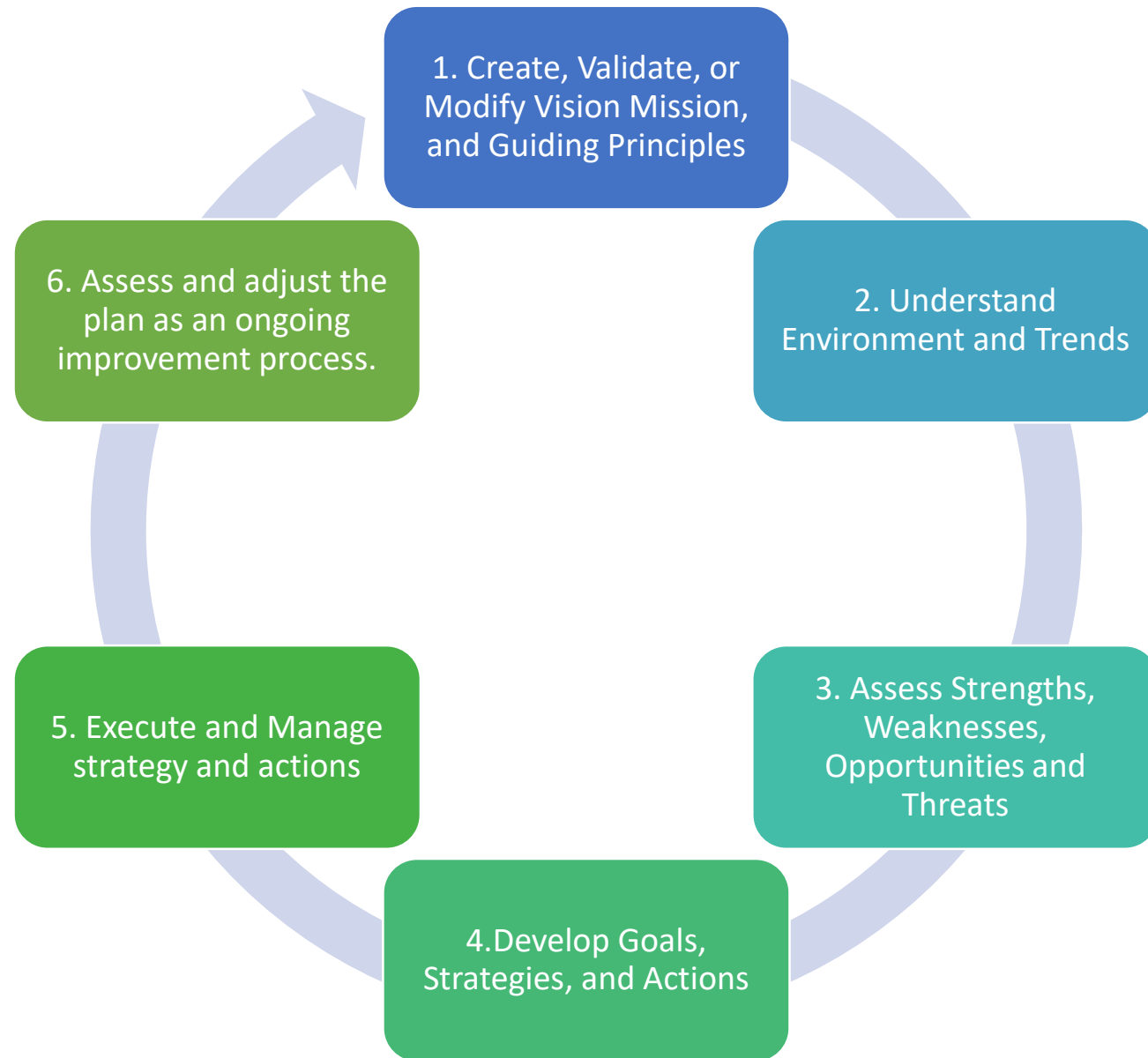


Vision without action is merely a dream.
Action without vision just passes the time.
Vision with action can change the world.
– Joel Barker





Strategic Planning Cycle

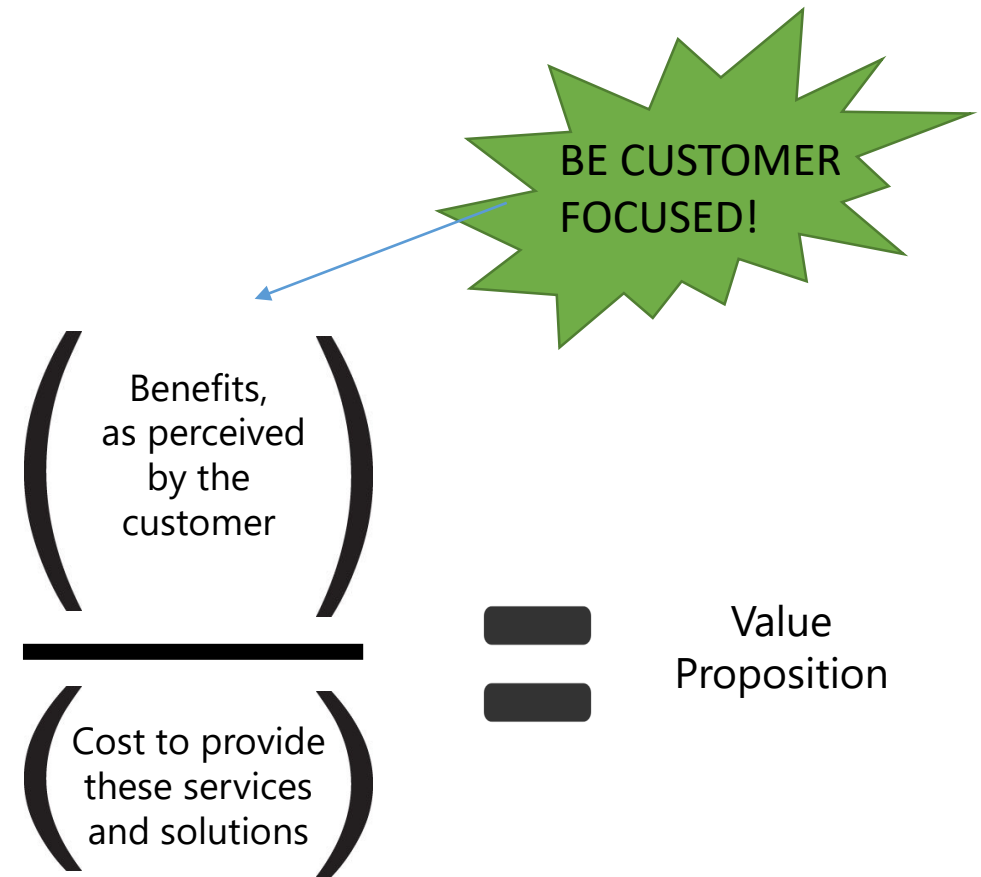


Vision Statement

- What is the value you provide to customers?
- What is your desired destination?

PSH Vision: 

We will be trusted advisors partnering with our customers to provide medical equipment services in support of a safe patient environment.



Mission Statement

- What is your core reason to exist?



Guiding Principles

- HOW will you accomplish your vision?
- Behaviors or actions that will guide staff level employees on daily choices.

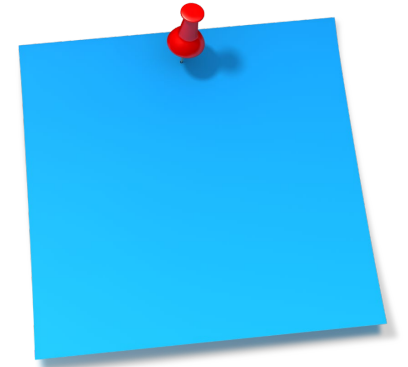
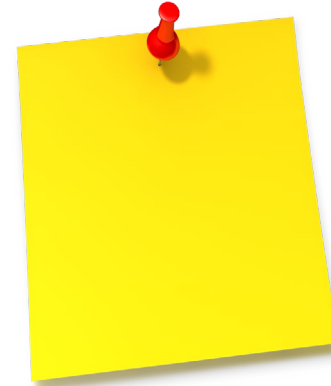
PSH Guiding Principle (Example) 

Clinical Engineering with drive standardization in people, process and technology towards best practice.



Operational Review

- Current State Assessment
 - Key Challenges/Issues
 - People
 - Process
 - Technology
 - Current Goals
 - Current Initiatives planned this year



SWOT Analysis

Determine how to leverage advantages and eliminate/limit exposure.

Any existing or potential resource or capability **within our department** that provides us with an advantage. These are our core competencies!

Internal View

Strengths

Weaknesses

Any existing or potential **internal force within our department** which could serve as a barrier to maintaining or achieving an advantage. What do we need to fix?

Any existing or potential force **external to the department** that, if properly exploited, could provide an advantage. What do we need to take advantage of?

External View

Opportunities

Threats

Any existing or potential force **external to the department** that could inhibit the maintenance or attainment of an advantage. What risks and threats could potentially derail our efforts?



Strategic Plan



- Define Strategic Imperatives
 - 3-5 areas of work that will take 3-5 years to reach
 - Focus on areas to make meaningful service/operational difference
- HOW?
 - Categorize list of Key Challenges/Issues
 - Review SWOT
 - Align to Vision



PSH: Strategic Imperatives



- Grow and Develop out People
- Standardize Medical Equipment Across the System
- E-Enable Clinical Engineering Service
- Reduce Service Delivery Costs



Goals/Objectives/Actions

- Measureable outcomes/projects team can achieve in 1-2 years aligned to a strategic imperative
- Define
 - Deliverables
 - Timeline
 - Risks
- Best Practice
 - Assign a sponsor to spearhead project
 - Assign/volunteer staff to be engaged
 - Tie to annual performance goals



IMPERATIVE (Why)		Goal	SPONSOR	Entity 1		Entity 2		Entity 3		Other Department		Deliverables	Timeline	Risks
				Team Member 1	Team Member 2	Team Member 1	Team Member 2	Team Member 1	Team Member 2	Team Member 1	Team Member 2			
I	Grow and Develop our People	Training? RACI? Job Function Matrix?												
II	Standardize Medical Equipment	Align with Supply Chain? Facilities?												
III	E-Enable Clinical Engineering	Transition CMMS, Implement Handhelds, Better Reporting												
IV	Reduce Service Delivery Costs	Reduce Parts Cost?												





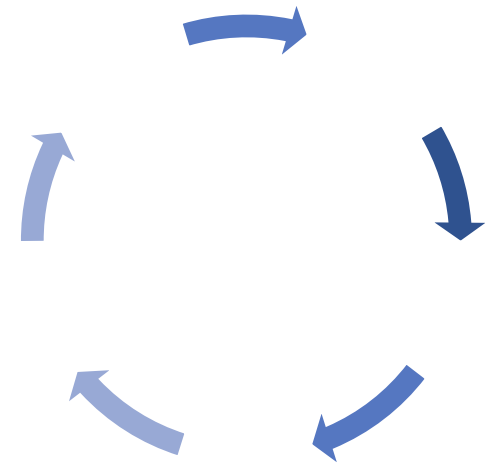
Vision without
Execution is
Delusion. – Thomas
Edison

Done 



Close the Loop

- Execute and Manage Strategy and Actions
 - Align to annual goals process
 - Measure
 - Manage Roadblocks
- Reassess and adjust the plan as ongoing improvement activities
 - Annual Review of plan – does this still make sense?
 - Adjust to changing landscape



Questions?





PSH CE Guiding Principles

1. Clinical Engineering will create a culture of transparent accountability in support of organizational values.

2. Clinical Engineering is customer focused. We identify customer and patient needs and provide services through timely action and communications.

3. Clinical Engineering is a team sport. We will partner with team members, support service departments, care givers and suppliers.

4. Clinical Engineering will drive standardization in people, process, and technology towards best practices.

5. Clinical Engineering will leverage people, process, and technology to optimize service delivery and value.

6. Clinical Engineering will provide educational opportunities for staff to foster an environment of growth and development.

7. Clinical Engineering will leverage educational opportunities to grow customer knowledge on medical equipment in support of a safe patient environment.

