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Scope of Work: Agency Strategic Planning
Hocking County Health Department (HCHD) and Center for Public Health Practice, The Ohio State University College of Public Health (OSU)
DRAFT

Note: *This scope of work and cost will be finalized upon further conversation with the client.*

OSU will:

- Contribute to a jointly developed project plan and timeline
- Schedule phone calls, as needed, with HCDH liaison for ongoing planning purposes
- Conduct one (1), thirty (30) minute online webinar with all staff to orient agency to the strategic planning process.
- Conduct an online SWOT analysis to gather input from all staff and board members that will inform strategic plan development.
- Work with the client to identify additional inputs (i.e. CHIP, customer service data) that may inform planning efforts.
- Plan a process for, and facilitate up to two (2) full-day planning meetings with up to ten (10) staff and board members (Strategic Planning Team). Meeting outcomes include:
    - Establishment and/or revision of existing mission, vision, and values
    - Identification of strategic priorities
    - Draft strategies and objectives
- Provide up to eight (8) additional hours of consultation for strategic workplan completion.
- Provide resources, templates, and materials for in-person meetings (i.e., workplan templates, chart paper, markers, etc.), if and when applicable.
- Provide technology for online webinar and SWOT analysis
- Draft a formal strategic plan report
- Evaluate the process

HCHD will:

- Appoint a representative to serve as primary liaison with OSU for all planning purposes
- Contribute to a jointly developed project plan and timeline
- Participate in phone calls, as needed, for ongoing planning purposes
- Provide OSU with additional inputs that may inform the strategic planning process (i.e. CHA, customer service data, etc.), as needed
- Arrange all in-person meeting logistics (i.e. date and time selection, location, facilities, food, etc.)
- Provide AV equipment (i.e. laptop, projector, screen) for staff to view online orientation and for in-person meetings, if needed.
- Perform all communication with participants
- Provide ongoing feedback to OSU for the purpose of quality improvement

Timeline: January 1, 2017 – May 31, 2017

Hocking County Health Department
Proposed Strategic Planning Process

Orientation/Staff Meeting

Purpose: Introduce HCHD staff to the strategic planning process. Provide instructions for completing the online MVV and SWOT (SOAR?) survey which will serve to provide additional inputs into the planning process.

Who: HCHD Staff and Board Members

Format: Recorded webinar created by OSU

Date/Time: Week of January 23, 2017

Online Survey

Purpose: Collect inputs/feedback regarding mission, vision and values, as well as internal strengths and weaknesses and external opportunities and threats. (SOAR?) This information will help to inform the establishment of a mission, vision and values for the agency as well as inform the identification of strategic priorities.

Who: All HCHD Staff, Board Members, and select community stakeholders
Note: one survey link with skip logic embedded (staff/board/community partners)

Format: Online survey (Qualtrics) administered by OSU

Date/Time: Launch week of January 30, 2017 (if not before); Close February 10, 2017

Pre-Work Strategic Planning Meeting #1:

Purpose: Draft/revise mission, vision, and values (MVV) based on input from staff and board. Bring proposed MVV to first in-person planning meeting for final affirmation.

Who: Strategic Planning Team or 1-2 reps from Strategic Planning Team (TBD)

Format: Self-facilitated with consultation/support from OSU, if needed.

Date/Time: Late February/Early March

In-Person Strategic Planning Meeting #1

Purpose: Affirm Mission, Vision, and Values. Identify strategic priorities and goal statements.

Who: OSU and Strategic Planning Team

Format: 6 hour in-person meeting facilitated by OSU

Date/Time: Mid-March 2017 (Exact Date TBD)

Proposed Agenda/Process:

1. Present and confirm M, V, V
2. Review SWOT data; identify themes (potential priorities)
3. Select priorities
4. Establish clear meaning/description for each priority area
5. Identify goal statement/measure
6. Begin to identify potential objectives (time permitting)

(Note: Potential inputs to include: CHA, CHIP priorities, SWOT (SOAR?) summary, other?? OSU to take information from this meeting and begin to draft SP workplan; submit to HCHD for review.)

Pre-Work Strategic Planning Meeting #2:

Purpose: Review SP workplan drafted by OSU; submit edits/revisions to OSU

Who: Strategic Planning Team

Format: In-person meeting; self-facilitated to gather feedback; or via email

Date/Time: After planning meeting #1, and before planning meeting #2

In-Person Strategic Planning Meeting #2:

Purpose: Finalize objectives for each priority area; draft remainder of work plan (time permitting)

Who: OSU and Strategic Planning Team

Format: 6 hour in-person meeting facilitated by OSU

Date/Time: Early April 2017 (Exact Date TBD)

Proposed Agenda/Process: TBD; dependent upon progress made in Meeting #1

(Note: OSU to take information gathered at this meeting and refine objectives in workplan; submit to HCHD for review.)

Additional Post Meeting Consultation:

Purpose: Complete SP workplan; draft formal strategic plan report

Who: OSU, Primary HCHD contact, and Strategic Planning Team (as needed)

Format: In-house, self-facilitated with distance-based consultation /support from OSU

Date/Time: After meeting #2 and before May 31; multiple meetings may be required