

Bold Strategic Planning for Uncertain Times

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Have you
ever been part of a
strategic plan that
ended up
on a shelf?



Objectives

- Reimagine strategic planning as a living process, not a one-time event
- Explore common myths and facts about strategic planning in Free and Charitable Clinics
- Identify how strategic plans can provide a bold direction for Free and Charitable Clinics in uncertain times



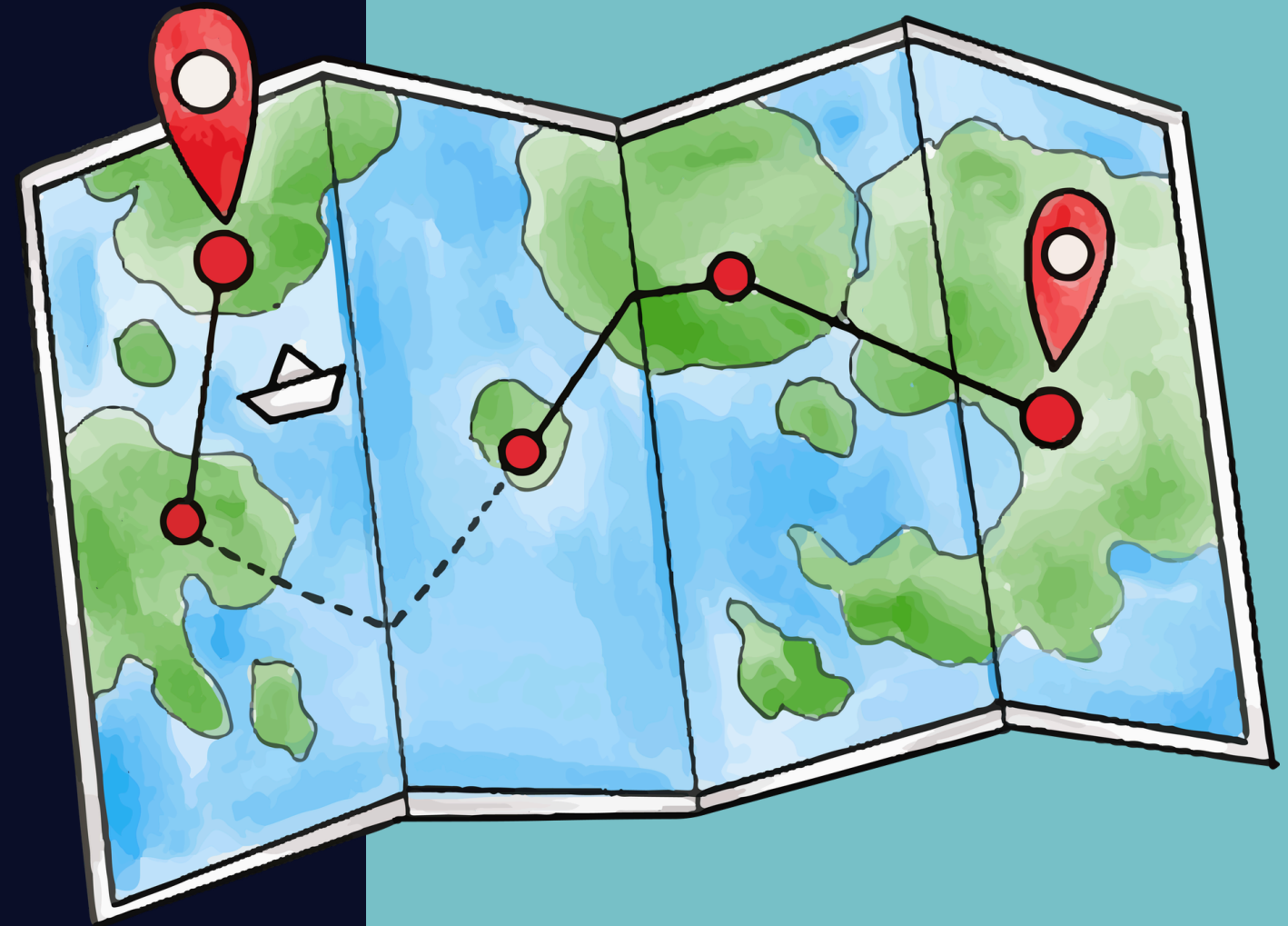
What is a Strategic Plan?



Hint: It is not a document.

What is a Strategic Plan?

- Organization-wide **agreement**
- Explains how the organization will **move forward** with its mission and purpose
- **Provides a pathway** to achieving the organization's goals and objectives



Why Does Strategic Planning Matter?



Why Strategic Planning Matters

- Clarifies mission and priorities
- Informs decisions about programs, resources, and financial needs
- Builds alignment between staff, board, volunteers, and partners
- Encourages adaptability and resilience





What Makes Strategic Planning BOLD?

What Makes Strategic Planning BOLD?

- Honest self-assessment
- Driven by data and insights
- Stakes a position
- Navigates complexity
- Changes positioning, capabilities, or services
- Identifies the resources needed

Agree/Disagree

If you agree with the statement generally, stand up or raise your hand



Organizational Readiness

- Mix of perspectives on SP team
- Inclusive and broad
- Roles identified and assigned
- Clear decision-making process
- Funding & staff time are allocated to process

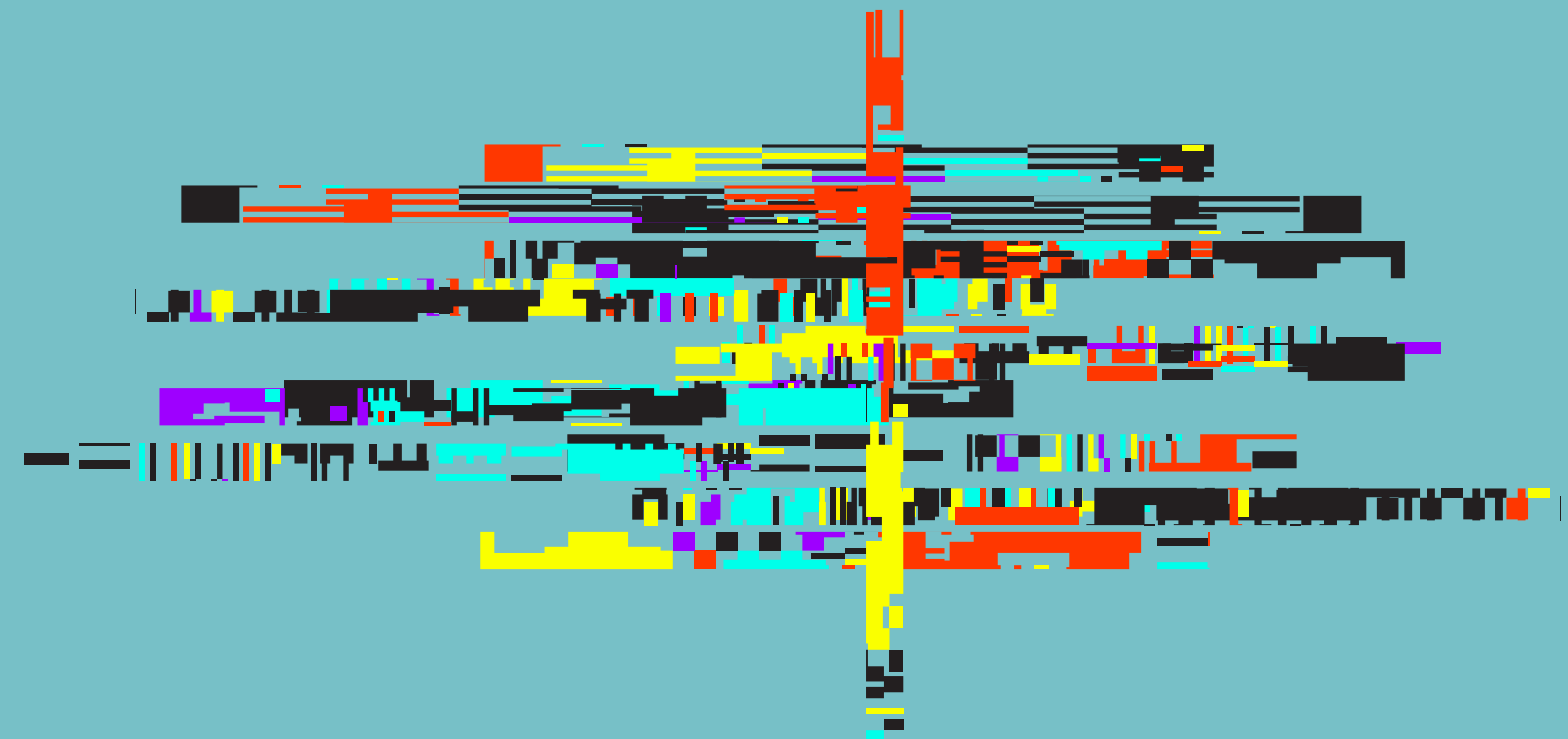
Organizational Readiness

- Clear, shared understanding of end result
- Agreement on scope
- Organization is ready to commit the resources to implementation, even if it means a change from the current work

Living vs. Static Strategic Plan



vs.



Summary

Bold strategic planning means that your plan isn't a document.

It is an agreement that results from an inclusive process

conducted at the right time, with the right people.

Having a “final” plan is not the end, just formalizes the agreement to work on it.

The real work comes with implementation, monitoring, and revisions.

Resources

Handout: Concepts for Strategic Planning in Free and Charitable
Clinics & Charitable Pharmacies

Creating a Dynamic and Useful Strategic Plan:
A Toolkit for Health Centers

[https://www.caplink.org/images/stories/Resources/publications/Toolkit-
Creating-a-Dynamic-and-Useful-Strategic-Plan.pdf](https://www.caplink.org/images/stories/Resources/publications/Toolkit-Creating-a-Dynamic-and-Useful-Strategic-Plan.pdf)

Thank You

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