L.A. Trust Mission Statement

The 3-year Plan is designed to support mission statement

Improve student health and increase readiness to learn through access, advocacy and programs.
Strategic Planning Process

Development and management of the strategic plan takes place across 7 key steps

1. Determine 3-year strategic goals, ensuring alignment with mission statement
2. Craft initiatives to support strategic goals; assign an owner to each initiative
3. Identify enablers/resources needed to support each strategic goal and initiative
4. Forecast quarterly targets for each initiative
5. Team members update their Smartsheet project plans, mapping each action to the specific strategic initiatives it impacts
6. Strategic initiative owners run a report across team’s mapped actions, 2 weeks after each quarter. Results are compiled to provide a quarterly Plan update
7. Goal owners review strategic goals/initiatives prior to the start of each fiscal year and modify based on changes in priorities & resources
Guiding Principles for Developing Strategic Plan

Guiding principles used to develop plan to drive results

**Specificity**
- Specific quarterly targets will be set for each of the 12 initiatives

**Accountability**
- Each initiative will have an ‘owner’ responsible for providing updates and managing plan to hit quarterly targets
  - Board will be presented quarterly updates on initiatives
  - Initiatives will be calibrated once a year in April to accommodate shifts in budget and priorities

**Review**

**Focus**
- Every project the team engages in needs to directly support one of the strategic goals/initiatives

**Competency**
- Enablers/Resources of people, process, data and funding will be developed to meet goals
1. Integrated Wellness
- Facilitate access and delivery of physical, oral, and behavior wellness services

2. Policy Advocacy
- Advocate for policy & legislation that broadens access, reimbursement, and delivery of services within LAUSD, the county, and the state

3. Backbone Support
- Develop shared services that create scale and benefits across all Wellness Networks and community partnerships that support integrated wellness

### Strategic Goals

#### 1. Optimize Wellness
- **Phase 2**
- **Expand Access**
- **Improve WC performance**
- **Foster a population health focus**

#### 2. Advocate for legislative policies
- **Develop student health advocates**

#### 3. Develop centralized database
- **Develop marketing & promotions as shared services across WCs**
- **Administrative Infrastructure**

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**Strategic Goal Resource Enablers**
Strategic Plan Structure

1. **Integrated Wellness**
   - Facilitate access and delivery of physical, oral, and behavior wellness services

2. **Policy Advocacy**
   - Advocate for policy & legislation that broadens access, reimbursement, and delivery of services within LAUSD, the county, and the state

3. **Backbone Support**
   - Develop shared services that create scale and benefits across all Wellness Networks and community partnerships that support integrated wellness

**Goal Categories**
- 1.1 Optimize Wellness Phase 2
- 1.2 Expand Access
- 1.3 Improve WC performance
- 1.4 Foster a population health focus
- 2.1 Advocate for legislative policies
- 2.2 Develop student health advocates
- 3.1 Develop centralized database
- 3.2 Develop marketing & promotions as shared services across WCs
- 3.3 Administrative infrastructure

**Strategic Goals**
- 1.1.a Drive Expansion
- 1.1.b Include architectural model elements for all sites
- 1.2.a Promote oral health
- 1.2.b Oral health integrated into all primary care systems
- 1.3.a Establish WC standards, Continuous Quality Improvement & metrics
- 1.4.a Create WC health reports
- 2.1.a 50% of Kindergarten students receiving oral health screenings
- 2.1.b Establish expanded point of service payment
- 2.2.a Develop WC Student Advisory Board members to be health and policy advocates
- 3.1.a 'Dash to Wellness' solution
- 3.2.a Develop and implement communications strategy
- 3.3.a Increase productivity, reduce cost, and improve quality of products and services

**Supporting Initiatives**
- 1.1.b Include architectural model elements for all sites
- 1.2.b Oral health integrated into all primary care systems
- 1.3.a Establish WC standards, Continuous Quality Improvement & metrics
- 1.4.a Create WC health reports
- 2.1.b Establish expanded point of service payment
- 2.2.a Develop WC Student Advisory Board members to be health and policy advocates
- 3.1.a ‘Dash to Wellness’ solution
- 3.2.a Develop and implement communications strategy
- 3.3.a Increase productivity, reduce cost, and improve quality of products and services

**Strategic Goal Resource Enablers**
The 3-year strategy action plan will be supported by enablers—core competencies in the nonprofit sector

**People:** Address skills, time commitment and organizational structure need to achieve strategic goals

**Process and Programs:** Define the “way in which work gets done”

**Technology:** Identify data and technology is needed to support strategic goals

**Funding:** Determine financial resources required to fulfill strategic goals. Sources include: budget surpluses; grants and awards; fund development efforts that raise money for a specific objective
Potential Strategic Goals Enablers

Potential resources that may be needed to support strategic goals

**People**
- Mission and strategic plan Alignment across all parties
- Corporate contract resources
- Corporate full-time resources
- WC contract resources
- WC full-time resources
- Training

**Process and Programs**
- Partnerships to enable programs
- Process improvement
- Training
- Process development/creation

**Technology**
- Automated reporting and interface with WC
- Training
- New platforms
- Additional software

**Funding**
- Individual donors
- Grants
- Annual Fundraisers
### Strategic Goals Enabler Map (page 1 of 2)

**Resources needed to support (1) Integrated Wellness category**

<table>
<thead>
<tr>
<th>Initiative</th>
<th>People</th>
<th>Process &amp; Programs</th>
<th>Technology</th>
<th>Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1.a Drive Expansion</td>
<td>• 1 addtl corp. resource • ½ data analysis corp. resource • ¼ of funding resource</td>
<td>• Community clinic partnerships</td>
<td>• Will link to Dash to Wellness system</td>
<td>• Vanessa’s time to fundraise • Addtl funds for new WC (grants)</td>
</tr>
<tr>
<td>1.1.b Architectural model</td>
<td>• N/A</td>
<td>N/A</td>
<td>• All sites will need wifi</td>
<td>• $150k cosmetic improvements – (individual donor)</td>
</tr>
<tr>
<td>1.2.a ‘Dash to Wellness’ solution</td>
<td>• IT systems developers • See Nishu’s analysis for details</td>
<td>• Train all corp and WC staff</td>
<td>• See Nishu’s plan for details</td>
<td>• $2.2M needed (grants and ‘in kind’)</td>
</tr>
<tr>
<td>1.2.b Promote oral health</td>
<td>• PT program coordinator • PT Comms assoc • Funding resource</td>
<td>• Communication roundtable by year 3</td>
<td>• Regular infrastructure</td>
<td>• 6 full time system managers: $700k a year (grants) • Addtl resources ($110k)</td>
</tr>
<tr>
<td>1.2.c Oral health integrated into Primary systems</td>
<td>• N/A</td>
<td>• Community clinic partnerships • Dental provider partnership</td>
<td>• Data linked to DTW</td>
<td>• N/A</td>
</tr>
<tr>
<td>1.3.a Establish Wellness Center standards &amp; metrics</td>
<td>• 1/3 FT corp resource (year 2)</td>
<td>• Learning Collaborative • Board Ops involvement • Wellness Network Group involvement • Training rollout</td>
<td>• Linked to DTW</td>
<td>• Fund resource and training (grants)</td>
</tr>
<tr>
<td>1.3.b CQI</td>
<td>• 1/3 FT Corp resource (year 2)</td>
<td>• Learning Collaborative • Board Ops involvement • Wellness Network Group involvement • Training rollout</td>
<td>• Linked to DTW</td>
<td>Fund resource and training (grants)</td>
</tr>
</tbody>
</table>
## Strategic Goals Enabler Mapping (page 2 of 2)

### Resources needed to support (2) Policy Advocacy and (3) Backbone Support

<table>
<thead>
<tr>
<th>Initiative</th>
<th>People &amp; Structure</th>
<th>Process &amp; Programs</th>
<th>Data &amp; Tech</th>
<th>Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1.a 50% of Kindergarten students receiving oral health screenings</td>
<td>• Part-time policy analyst in year 1</td>
<td>• Need a policy tracking process</td>
<td>• N/A</td>
<td>• Fund PT policy analyst (grants)</td>
</tr>
<tr>
<td>2.1.b Expanded point of service payment</td>
<td>• N/A</td>
<td>• LA Care, Kaiser, HealthNet partnerships</td>
<td>• N/A</td>
<td>• N/A</td>
</tr>
<tr>
<td>2.2.a Develop student engagement in WC advisory board</td>
<td>• N/A</td>
<td>• Yes partnership • InnerCity Struggle partnership • Training</td>
<td>• N/A</td>
<td>• Training funding • Travel/expense budget for capital/advocacy visits (mix of grants and individual donors)</td>
</tr>
<tr>
<td>3.1.a Develop database, reporting tool, and interface</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.2.a Create centralized marketing campaigns</td>
<td>Pending assessment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.2.b Increase productivity, reduce cost, and improve quality of products/services</td>
<td>Pending assessment</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Strategic Plan Implementation
Tracking Strategic Goals

Team members will map their activities in Smartsheet to the strategic plan.

Mapping in Smartsheet will help the goal owners track progress and consolidate quarterly updates. Example below...

![Smartsheet screenshot](image)

**Important Note:** Not all team members’ responsibilities are reflected in the strategic plan. Business as usual (BAU) tasks, while supporting the strategic goals, are not primary drivers and as such are not reflected in this high-level plan.
Strategic Goal and Initiative Quarterly Tracker Example

The tracker details quarterly targets, actual outcome and improvement plan, if needed. Below is an excerpt....

<table>
<thead>
<tr>
<th>Strategic Goal Category</th>
<th>Objective</th>
<th>Expected Outcome</th>
<th>Actual Outcome</th>
<th>Improvement Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1 Integrated Wellness</td>
<td>1.1 Optimize Wellness Phase 2 (MJP)</td>
<td>Plan should be approved</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.1.a Drive Expansion</td>
<td>Architect plans shared with Wellness Phase 2 committee</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.1.b Include architectural 'model' elements for all sites</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.2 Expand Access (Sang)</td>
<td>Oral Health education/resources toolkit completed and launched on Trust website</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.2.a Promote, educate and facilitate oral health across defined community (educate, train, motivate parents, kids, professionals)</td>
<td>Assessment of each Wellness Center capacity is established</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.2.b Oral Health is integrated into all primary care systems</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.3 Improve Wellness Center performance (Sang)</td>
<td>Develop draft standards with sub-committee</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.3.a Establish WC standards of performance, a culture of Continuous Quality Improvement and a measurement convention</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.4 Foster a population health focus (MJP)</td>
<td>Share overall Wellness Index maps with each site</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>1.4.a Create individual population health reports for each WC site to advance impact</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Quarterly Strategic Goal Executive Dashboard

The strategic goal dashboard will be a high-level status provided to executives and external stakeholders.

<table>
<thead>
<tr>
<th>Strategic Goal</th>
<th>Status</th>
<th>Red Flags</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 Optimize Wellness Phase 2</td>
<td><img src="#" alt="Green" /></td>
<td><img src="#" alt="Green" /></td>
</tr>
<tr>
<td>1.2 Expand Access</td>
<td><img src="#" alt="Green" /></td>
<td><img src="#" alt="Green" /></td>
</tr>
<tr>
<td>1.3 Improve WC performance</td>
<td><img src="#" alt="Green" /></td>
<td><img src="#" alt="Green" /></td>
</tr>
<tr>
<td>1.4 Foster a population health focus</td>
<td><img src="#" alt="Green" /></td>
<td><img src="#" alt="Green" /></td>
</tr>
<tr>
<td>2.1 Advocate for legislative policies</td>
<td><img src="#" alt="Green" /></td>
<td><img src="#" alt="Green" /></td>
</tr>
<tr>
<td>2.2 Develop student health advocates</td>
<td><img src="#" alt="Green" /></td>
<td><img src="#" alt="Green" /></td>
</tr>
<tr>
<td>3.1 Develop centralized database</td>
<td><img src="#" alt="Green" /></td>
<td><img src="#" alt="Green" /></td>
</tr>
<tr>
<td>3.2 Develop marketing &amp; promotions as shared services across WCs</td>
<td><img src="#" alt="Green" /></td>
<td><img src="#" alt="Green" /></td>
</tr>
<tr>
<td>3.3 Administrative Infrastructure</td>
<td><img src="#" alt="Green" /></td>
<td><img src="#" alt="Green" /></td>
</tr>
</tbody>
</table>

- **Green** = on track, no issues
- **Yellow** = on track with issues
- **Red** = not on track with issues