

# Developing a Plan for Growth

## Your Strategic Plan

Even before your clinic is open, it is prudent to think about how your operation will change and grow over the next three to five years. Most clinics start small and increase their size and patient services as their resources and expertise increase, coupled with the needs and demands for service from the community. Developing a plan for that growth before it occurs can help increase the likelihood that it will occur without undue disruption to the organization.

## Where to Begin

The planning done during the initial start-up discussions for the clinic should have produced projections for the first year of operations. You should already know how many clinic sessions will be conducted each month with an estimate of the number of patients served, how many clinical providers and lay volunteers will be needed and your initial staffing requirements. These projections should form the baseline for your plan for growth. Project forward three years by assuming a rate of increase that will allow your clinic to be serving 2,000 individual patients after the end of the fourth year of operation which will be approximately 5,000 patient visits.

## Strategic Planning

1) The mechanism for developing your plan for growth along with the objective measures to track your progress in achieving these ends is strategic planning, a standard practice of quality not for profit organizations. Strategic planning is a systematic process of envisioning a desired future, and translating this vision into broadly defined goals and objectives and a sequence of steps to achieve them. In most situations, Boards will engage in a strategic planning session within one to three years of opening. More information on strategic planning is available at the end of this section.

2) Strategic planning is a primary responsibility of the Board and senior staff of the clinic. It is recommended that the clinic have this process facilitated by an outside consultant who can provide objective and planned structure for the process. Consultants differ as to approach and the clinic should review proposals from

several before deciding. Strategic planning is particularly crucial in allowing a clinic to proactively plan for a future during times of significant change in the healthcare environment. This process allows the clinic leadership to reaffirm its core values along with its mission and vision. It will define the goals along with the measurable objectives that will track progress toward goal achievement. It will also identify who will be accountable for each goal. (More in the following section)

3) Strategic planning should be conducted every two–three years. During these times of significant change throughout the healthcare industry, predicting change beyond that period stretches credibility. The plan itself should be used as an institutional roadmap that can guide and channel the energies of the clinic through this period. Many successful Boards use the strategic plan to track their activities, including successes and areas that require attention. While a strategic plan is not cast in stone, a well-prepared plan can be a surprisingly accurate forecasting tool. Strategic plans will generally focus on a number of key areas for a clinic’s future activities.

Some key areas of focus are:

- Capital Needs
  - Questions to ask:
    - Is your current facility large enough or will you need to explore moving to another location or possibly building a facility?
    - What is your facility’s current capacity?
    - How many exam rooms are available?
    - Do you own or rent the space?
    - Is it possible to add onto the current facility to increase its capacity?

Be creative and explore different options, but do not let the fact that you cannot answer the question definitively prevent you from planning to grow.

- Clinical Service
  - Questions to ask as you expand and grow:
    - What additional services do you envision providing?

- What needs were recognized in your initial assessment which may be possible to provide in the future?
- Would services such as dental, mental health, medical or nutritional education be desirable additions?
- How many clinic sessions each month will be required to meet the goal?
- Can you achieve this level of service by being open a limited number of days each week or does a five-day a week clinic schedule become necessary?
- Personnel
  - Increasing the number of paid staff will be necessary to achieve the level of services projected in the plan.
  - This may require staff additions including:
    - an administrator
    - a caseworker
    - a nurse manager
    - a pharmacy coordinator
    - possibly a physician or mid-level provider to the paid staff
    - increase the number of volunteers (both clinical and non-clinical)

Do your best to project those numbers over the three-year growth plan keeping in mind the addition of new clinical services being added.

- External Relationships
  - While your community or faith-based organization may be the sponsor of the clinic, your goal should be for the clinic to become a project of the entire community in which it serves. To achieve this goal, new relationships within the community will need to be formed and existing ones broadened.
  - Questions to ask:
    - How many churches do you envision supporting the clinic tracking through the three-year period?
    - Have you solidified a relationship with the local hospital?
    - Is there more than one in your community you can reach out to?

- Does every medical practice in the community either provide volunteers or agree to accept clinic referrals at no cost or steeply discounted rates?
- How many local civic clubs support the clinic?
- Are you an active member of your state and the national charitable clinic association?

Building relationships takes time and patience, so make this a top priority of the management team.

- Resource Development
  - Adding staff, increasing the hours of operation, building a facility, dispensing more prescriptions will all take more resources than your first year projection. Your plan should include a pro-forma budget projection for each year of growth that the Resource Development committee can use to plan the fundraising needs for the clinic. Keep in mind that private foundations are more willing to fund the startup and expansion of a program than its continued operations. They may not be so essential in on-going operations. You should also consider the impact of Health Reform in your community and state as it relates to the overall perceptions of need for your service as well as means to generate support to sustain and/or grow your clinic operation.

#### Important Note

Review your plan yearly and have adjustments made to the projections on service delivery. The plan should not be static, but adjustable to changes in the community and environment in which you operate.