

Annex Strategic Plan

October 2014



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ANNEX STRATEGIC PLAN

SUMMARY

In the spring of 2013, the Annex Teen Clinic Board of Directors determined that it was time for new thinking and creative responses to new challenges: it was time to plan strategically for the future of the Annex. Many events were in flux: the Affordable Care Act was legislated and due to roll out in early 2014. The Annex Health Department had rapidly doubled its size through its grant-funded participation in a state/federal research program on adolescent unplanned pregnancy prevention. Although the Annex had been housed in its new location just a short while, it was already squeezing the space. The Clinic was engaged in continuous improvement and was implementing new medical record technology while learning to bill insurance companies.

These challenges posed a planning problem: what scope of questions and plans should be explored? Ultimately the Board asked for a complete look at all programs and services while understanding this might lead to changes in the mission statement itself.

In the spring of 2013 Annex staff began a rigorous scoping activity: they generated more than 300 questions to ask about marketing, service delivery, programming, accessibility, client service and internal administration effectiveness. During the summer and fall these questions were analyzed, eventually reduced to 33 questions. These questions lay at the heart of decision making about positioning the Annex to be the best adolescent sexual health service provider it could be.

During the winter of 2013-2014 a number of planning activities occupied staff, Board members, stakeholders and customers. Five Work Groups were created: Programs and Services; Marketplace; Leadership and Internal Systems; Marketing; and Finance. They secured data to anchor their thinking, created “what if” scenarios or generated options for action. Finally, each Work Group created recommendations. These recommendations were modified by discussions with schools, community groups, and, importantly, clients and leaders from Hennepin County Health Department. In particular, staff from the Annex surveyed youth in the northwest suburbs and incorporated that feedback into the strategic plan. Gradually the work of the five groups coalesced into clear declarations of what the Annex wants to be and do in 2020. These position statements comprise the plan.

This written report is a supplement to the digital report, which includes strategies and goals for these position statements. The digital format also includes records of questions, research, analysis and comprehension.

This is the Annex Teen Clinic Strategic Plan in October 2014.

THE MISSION OF THE ANNEX

To be drafted by the Board Key phrases: adolescent sexual health; authentic youth-adult partnerships; supporting the whole person; clinic; education; essential community provider; accessibility; northwest suburbs

THE VISION OF THE ANNEX

To be drafted by the Board Key phrases: pregnancy / disease prevention; youth development model; case management; continuous quality improvement; strong organization

POSITION STATEMENT 1

The Annex is an essential community provider of high quality, accessible services for adolescent sexual health.

POSITION STATEMENT 2

Work is driven by positive youth development principles.

POSITION STATEMENT 3

The Annex is a critical access point for advancing and coordinating young people's health and wellness goals.

POSITION STATEMENT 4

Parents, professionals and youth advocates consider the Annex a high quality resource on adolescent sexual health.

POSITION STATEMENT 5

The public understands how the Annex positively contributes to young people's lives.

POSITION STATEMENT 6

The Annex thrives on diverse and sustainable finances.

POSITION STATEMENT 7

The Annex provides a challenging and supportive environment for mission-driven employees and volunteers.

POSITION STATEMENT 8

Strong leaders promote innovation, embrace best practices and ensure longevity.

THE VALUES THAT DRIVE PERFORMANCE

The values of the Annex Teen Clinic were developed through an extensive process of discussion, revision, and collaboration with Annex staff, volunteers, board members and youth council members. These values guide our decision-making processes and the delivery of our services. Through the application of our values, we will develop and maintain healthy relationships with youth and their families, our organizational partners, co-workers, and the community as a whole.

ANNEX TEEN CLINIC VALUES HEALTHY SEXUALITY

Sexuality is an intrinsic component of humanity and that every person experiences sexuality from birth to death. We celebrate that adolescent sexuality is a developmentally appropriate part of a life-long process. All people have the right to education about sexuality, sexual health care, and sexual expression appropriate to their age and stage of life. We know that parents are the primary sexuality educators for their children and work to provide trainings, resources, and encouragement to help parents succeed in this role.

ANNEX TEEN CLINIC VALUES ACCESS

We provide access to sexual health services and education at a low cost and believe in breaking down barriers to services and information. We value access to fact-based information for people of all ages that is accurate, up-to-date, confidential, and relevant. Young people deserve access to confidential health care services and information. We work to provide access to all young people, regardless of gender identity, sexual orientation, ethnic and racial background, or socio-economic status. We provide medically accurate information and place trust in young people to make informed decisions when they have access to accurate information. We advocate for public policies that support access to confidential health care services and information.

ANNEX TEEN CLINIC VALUES EXCELLENCE

We are committed to excellence in every aspect of our work. We strive to provide high quality information, products, programs, outcomes, services, and relationships. We are committed to the continuing education and ongoing development of our employees and volunteers. Our goal is to provide an exceptional experience for young people both in our clinical services and community outreach educational programs.

ANNEX TEEN CLINIC VALUES MUTUAL ENRICHMENT

Young people and adults can learn and gain skills from each other. This openness to learning from others helps inform healthy decisions. Because of our belief that young people need and deserve significant roles in the community, we partner with young people to enhance our services and create opportunities for youth to contribute in meaningful ways. We value authentic partnerships with a variety of organizations and communities and understand that our collaboration can lead to healthier communities. We challenge ourselves to provide culturally and linguistically relevant services to the diverse populations we serve and welcome partnerships to improve our cultural understanding and awareness.

ANNEX TEEN CLINIC VALUES BEING RELEVANT

Youth are central to our work! We value and strive to integrate all young people's perspectives into our programs and policies. Adolescence is a unique time in life, and has its own assets and challenges. Our ability to relate to teens is crucial to the success of the organization. We are committed to being confidential and nonjudgmental and forming meaningful relationships based on mutual respect.

THE EXECUTION OF THE PLAN

The strategic planning process was driven by the development of position statements. Each position statement has strategies and goals that make sense in October 2014. For the Annex to make strategic decisions, strict adherence to these goals is not useful; things change dramatically and quickly in the world of adolescent health. The Annex will cling to the meaning of the position statements, and look for every opportunity to move the organization towards these positions in every business and programming decision.

A key part of this adaptability is to drive decision making down into staff positions. Each staff member is reviewing his / her job description to recognize how the position statements direct and influence everyday decision-making by each staff member.

POSITION STATEMENT 1

THE ANNEX IS AN ESSENTIAL COMMUNITY PROVIDER OF HIGH QUALITY, ACCESSIBLE SERVICES FOR ADOLESCENT SEXUAL HEALTH.

Strategies

1. Maintain an on-going commitment to culturally competent services and programs, with a special emphasis on authentic youth-adult partnerships.
2. The Clinic and Health Education continually review and implement best practices for their patients.
3. The Annex operates a sustainable "It's Your Future" program.

Initiative: Continue to work with partner schools and Hennepin County to sustain and grow the "Whole School" program that evolved from TP3 and "It's Your Future".

4. Focus on customer service to all our customers, including program participants, patients, contractors, funders, and community partners.

POSITION STATEMENT 2

WORK IS DRIVEN BY POSITIVE YOUTH DEVELOPMENT PRINCIPLES.

Strategies

5. Authentic youth-adult partnerships serve as the foundation for all the Annex's services, both in the Clinic and Health Education departments.
6. Volunteers and staff understand youth development principles, and base our service delivery on them.
7. The Annex Advisory Council is an essential resource to guide the organization's operations, programs and priorities.

POSITION STATEMENT 3

THE ANNEX IS A CRITICAL ACCESS POINT FOR ADVANCING AND COORDINATING YOUNG PEOPLE'S HEALTH AND WELLNESS GOALS.

Strategies

8. Implement the most effective and cost-efficient methods for providing care coordination and counseling for clients seeking additional supports.
9. Continue to identify and cultivate additional collaborative partnerships with organizations that offer services to support the holistic health and wellness of Annex clients.

POSITION STATEMENT 4

PARENTS, PROFESSIONALS AND YOUTH ADVOCATES CONSIDER THE ANNEX A HIGH QUALITY RESOURCE ON ADOLESCENT SEXUAL HEALTH.

Strategies

10. Develop and grow high quality programming for parents, professionals and youth advocates by increasing dedicated FTE.
11. Continue to offer parent education classes and resources for parents, professionals and youth advocates.
12. Renew commitment to family / caregiver education programming like "Celebration of Change."

POSITION STATEMENT 5

THE PUBLIC UNDERSTANDS HOW THE ANNEX POSITIVELY CONTRIBUTES TO YOUNG PEOPLE'S LIVES.

Strategies

13. Use a branding process to create a vibrant marketing plan.

Initiatives: Create an identity.

Develop key messages and key audiences for those messages.

Create a brand and brand strategies.

Design and implement a marketing plan.

14. Integrate evidence-based successes into all materials, reports, marketing efforts and grant applications.

POSITION STATEMENT 6

THE ANNEX THRIVES ON DIVERSE AND SUSTAINABLE FINANCES.

Strategies

15. Develop a five-year development plan consistent with the goals and needs of the overall strategic plan.

Initiative: Build specific processes to solicit institutional, corporate sources and individual donors.

16. Work in partnership with Hennepin County to leverage on-going financial support for programs including those whose funding expires on August 31, 2015.

17. Strengthen fund development capacity by increasing dedicated FTE.

18. Develop a long-term capital plan to assure integrity of the Annex's physical assets.

19. Grow earned income revenue by securing contracts with primary insurance products used by Annex patients.

20. Continually review and implement best practices in technology, including a technology plan.

Initiative: Stay current with young people's use of internet and social media.

Ensure technology vendors can deliver preferred equipment and programs.

21. Integrate external vendors' accounting processes with internal receivables and coding.

POSITION STATEMENT 7

THE ANNEX PROVIDES A CHALLENGING AND SUPPORTIVE ENVIRONMENT FOR MISSION-DRIVEN EMPLOYEES AND VOLUNTEERS.

Strategies

22. Develop a uniform employee performance management system.
23. Create an extensive, internal staff and volunteer orientation to the Annex.
24. Create employee and volunteer appreciation processes, including regular appreciation events.
25. Plan and conduct employee development training including teambuilding and conflict resolution training.
26. Improve the human resource presence at the Annex, and its connection to employees.
27. Provide a stellar volunteer experience.

POSITION STATEMENT 8

STRONG LEADERS PROMOTE INNOVATION, EMBRACE BEST PRACTICES AND ENSURE LONGEVITY.

Strategies

28. Create succession plans.
29. Grow the Board's capacity for fund development.
30. Develop a plan to cross-train Director-level employees.
31. Integrate financial planning and management into all Director-level positions.
32. Shift Director-level staff from an operational focus to a leadership focus.
33. Create and nurture a healthy environment that explores and advances the integral connection of Clinic and Education programs and staff.

Initiative: Create a work plan with outcomes that emphasize the integration of clinic and education practices.

APPENDICES

The Annex Strategic Positions were developed over a period of 18 months, from the spring of 2013 to the fall of 2014. Many people gave serious thought, explored options and gathered data. This set of appendices detail this work.

A. THE ANNEX VALUES STATEMENTS

The Annex adopted a set of value statements in 2012 that guide the work.

The Strategic Positions and the strategic plan are based on these values.

B. LANGUAGE AND DEFINITIONS

This document explains commonly used phrases and definitions for adolescent sexuality and programming.

C. PRIMARY PLANNING DATA

This appendix includes many documents describing client needs and other data from 2013.

D. ORIGINAL QUESTIONS FROM STAFF FOR PLANNING PURPOSES

In April 2013 the staff met in large and small groups to identify the questions that should drive the planning process.

E. ORIGINAL QUESTIONS REFINED

During April and May the original 300 + questions were edited to eliminate duplications, questions for which staff believed there were answers, and clarity.

F. PREPLANNING DECISIONS

The spring of 2013 involved Board members, staff and key stakeholders in narrowing the scope of planning to make the project doable and comprehensible.

This document records those decisions.

G. PLANNING GUIDE BOOKLET FALL 2013

The booklet (by Karen Ray Associates) outlines the processes and methodology for planning.

H. ANNEX 2013-2014 WORK GROUP ROSTER

Primary planning activities were the responsibility of five Workgroups which included staff and Board. These Workgroups are Programs and Services, Leadership and Internal Systems, Marketplace, Finance and Marketing. In addition, the Plan was guided by the Strategic Planning Steering Committee. The Youth Engagement Committee was responsible for authentically listening to youth.

I. ANNEX GUIDE FOR WORK GROUPS

This document helped Workgroups stay focused.

J. ANNEX WORK GROUP FORM FOR RECOMMENDATIONS

Each Workgroup had some products it had to assemble, and this form ensured parallel products among Workgroups. Also, each Workgroup could make other recommendations they thought important to include in the planning process.

K. RESULTS OF THE WORK GROUPS

This file of documents includes Workgroup recommendations.

L. NOTES FROM THE MEETING WITH MINNESOTA DEPARTMENT OF HEALTH

Brian Russ and other leadership team members discussed the future of adolescent health programming with this important funder.

M. YOUTH ENGAGEMENT COMMITTEE REPORT

This PowerPoint summarizes the more than 400 adolescents interviewed about the plan.

N. WORK GROUP RECOMMENDATIONS SUMMARY (POWERPOINT) APRIL 2014

The fall and winter's work was summarized in this PowerPoint.

O. WORK GROUP RECOMMENDATIONS BECOME PLANNING TOPICS

After a set of 32 recommendations were accepted as part of the Strategic Plan, they were grouped by topic in order to create Position Statements.

P. COMPARISON OF WORK GROUP RECOMMENDATIONS AND TOPICS

This document shows which planning Workgroup recommendations were and were not included in the final set of topics.

Q. SPRING 2014 SUMMARY OF RECOMMENDATIONS

Further discussion resulted in this list of recommendations.

R. KAREN RAY ASSOCIATES DRAFTS POSITION STATEMENTS

Karen Ray translated the recommendations into an initial draft of Positions.

S. VERSION 6 STRATEGIC PLAN

After many revisions, these are the Positions that comprise the Strategic Plan. This document includes strategies and initiatives.

T. BOARD ADOPTS 8 POSITION STATEMENTS AND THE STRATEGIC PLAN OCTOBER 2014

This is the list of final eight Position Statements the Board formally adopted in October 2014.

U. KAREN RAY ASSOCIATES WORK PLAN 2013

V. KAREN RAY ASSOCIATES WORK PLAN 2013–2014
