***Special Note: After selecting the questions you would like to include in your pre-retreat survey, create a customized survey questionnaire by using this Microsoft Word****®* ***template, or through an online survey tool of your choice***.

[Enter Hospital Name]

**Strategic Planning Survey**

Dear Board Member/Senior Leader,

[Hospital Name] will hold our strategic planning retreat on Day, Date, Year.

The purpose of this survey is to secure your viewpoints about [Hospital Name] mission and values, and your vision for the future in several areas vital to the hospital's success. In addition, we need your opinions about strategic issues and challenges, critical factors in the hospital's success, and your thoughts about objectives for our upcoming retreat.

**The survey should take approximately 20 minutes to complete**. It is vital for us to have every leader's viewpoints to assist us in designing the retreat agenda. In addition, your opinions and ideas will provide us with a foundation to build on at the retreat, which will facilitate meaningful discussions and deliberations on the issues that matter most to our future.

Thank you for taking the time to complete this survey.

Sincerely,

Jane Doe, President & CEO, and

John Smith, Chairman

***Please submit this survey by 5:00 p.m.******Day and Date***

**If you prefer to take this survey online, go to:**

[Survey URL]

**If you are having survey problems, please contact:**

Email and/or telephone number

**Are you a:**

* Board member
* Senior leader
* Member of the medical staff

*\*Only include the above question if you would like to survey the broader leadership.*

Our Mission, Values and Vision

**Mission**

An organization's mission defines its reason for existence. [Hospital Name’s] mission is *"to provide competent, innovative, and accessible emergency and acute care services for the residents of Anytown County, regardless of their background or ability to pay. [Hospital Name] achieves this mission through reverence, integrity, compassion and excellence.”*

1. **Is this mission a powerful, distinctive and compelling statement of [Hospital Name’s]core purpose?**

* Yes
* No
* Maybe

If your answer is “no” or “maybe”, how do you believe our mission may be strengthened?

**Values**

[Hospital Name] has five core values: honesty, integrity, trustworthiness, compassion, and respect for others.

1. **How well do you believe [Hospital Name] exhibits these values?**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Very Well | Pretty Well | Not Well | Don’t Know |
| Honesty |  |  |  |  |
| Integrity |  |  |  |  |
| Trustworthiness |  |  |  |  |
| Compassion |  |  |  |  |
| Respect for Others |  |  |  |  |

What additional values do you believe are vital for [Hospital Name] to embrace and promote?

**Vision**

**[Hospital Name’s] vision is** *"to be the community’s preferred health care provider. We will achieve our vision through a culture of caring and compassion, and a continual quest toward excellence.”*

1. **Does this vision define the future that [Hospital Name] is seeking to achieve?**

* Yes
* No
* Maybe

If your answer is “no” or “maybe”, how do you believe our vision may be strengthened?

**Vision Statements**

1. **What would you like to be able to say about *[Hospital Name] three to five years from now in the following areas?***

* Competitiveness and Market Strength:
* Governing Leadership:
* Public Trust and Confidence:
* Quality:
* Patient Safety:
* Financial Strength:
* Community Partnerships and Relationships:
* Community Health Improvement:
* Physician Partnerships and Relationships:
* Efficiency and Effectiveness:
* Customer Service:
* Workforce:

1. **What else would you like to be able to say about [Hospital Name] in three to five years?**
2. **If [Hospital Name] were to be named America’s top hospital by Modern Healthcare Magazine in five years, and you were being interviewed by the reporter, what would you tell the reporter about the reasons [Hospital Name] has received this distinguished award?**

Strategic Issues and Challenges

1. **What are the most dominant issues facing [Hospital Name] today? (please check the three that you believe are most dominant)**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Increasing growth and market position |  | Improving quality outcomes |
|  | Improving our financial strength |  | Coping with the unknowns of health care reform |
|  | Combatting competitive threats |  | Increasing our ability to access capital |
|  | Strengthening our community reputation |  | Coping with staff and physician shortages |
|  | Improving efficiency and effectiveness |  | Becoming “meaningful users of health information technology |
|  | Improving our payer mix |  | Nurturing an organizational culture of excellence and performance |
|  | Building physician alignment and loyalty |  | Increases in bad debt and charity care |
|  | Improving patient and customer service |  |  |

1. **Does [Hospital Name] face additional significant challenges and what are they?**
2. **What are [Hospital Name’s] top 3 strengths and assets that we should work to capitalize on?**

**#1 strength or asset:**

**#2 strength or asset:**

**#3 strength or asset:**

1. **What are [Hospital Name’s] top 3 weaknesses or liabilities that we should work to minimize or eliminate?**

**#1 weakness or liability:**

**#2 weakness or liability:**

**#3 weakness or liability:**

Critical Success Factors

1. **How important are the following to [Hospital Name’s] success in the next five years?**

**Critical** = Absolutely vital to future success. This factor must be considered with the highest of importance as decisions are made about the ways in which [Hospital Name] can best meet the future health care needs of the communities we serve.

**Somewhat Important** = A non-critical, but still meaningful factor, to future success. This factor should have influence on decisions [Hospital Name] leadership makes about ways in which the hospital can best meet the future health care needs of the communities we serve.

**Not Important** = Not a factor in future success. This factor should not be considered by [Hospital Name] leadership in its decisions about ways in which the hospital can best meet the future health care needs of the communities we serve.

**Community Accountability**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Critical** | **Somewhat Important** | **Not Important** |
| Understanding current and emerging community health needs |  |  |  |
| Improving community health |  |  |  |
| Improving advocacy and representation of the hospital in the community |  |  |  |
| Improving advocacy and representation of the hospital to local government |  |  |  |
| Improving advocacy and representation of the hospital to state government |  |  |  |
| ***Community Accountability (continued)*** | **Critical** | **Somewhat Important** | **Not Important** |
| Improving advocacy and representation of the hospital to federal government |  |  |  |
| Reporting the benefit [Hospital Name] provides to the community |  |  |  |
| Expanding community involvement and outreach |  |  |  |
| Strengthening knowledge of community needs |  |  |  |
| Understanding the most appropriate role for the hospital in meeting community health needs |  |  |  |
| Building public trust |  |  |  |
| Working to improve quality transparency |  |  |  |
| Working to improve price transparency |  |  |  |
| Differentiating [Hospital Name] on value/outcomes to consumers |  |  |  |
| Differentiating [Hospital Name] on value/outcomes to payers |  |  |  |

**Quality/Patient Safety/Patient Experience**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Critical** | **Somewhat Important** | **Not Important** |
| Continuously building a performance improvement culture |  |  |  |
| Making [Hospital Name] a preferred place to practice medicine |  |  |  |
| Improving quality and patient safety |  |  |  |
| Ensuring the right number and types of physicians to meet emerging community needs |  |  |  |
| Measuring quality and safety progress through statistical performance indicators |  |  |  |
| Improving customer service |  |  |  |
| Utilizing evidence-based core practices |  |  |  |
| ***Quality/Patient Safety/Patient Experience (continued)*** | **Critical** | **Somewhat Important** | **Not Important** |
| Effectively using IT as a tool to improve quality outcomes |  |  |  |
| Assuring up-to-date technologies that meet patient needs and expectation |  |  |  |

**Financial Performance**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Critical** | **Somewhat Important** | **Not Important** |
| Ensuring access to capital |  |  |  |
| Operating efficiently |  |  |  |
| Managing our debt structure |  |  |  |
| Improving the capital equipment acquisition decisions |  |  |  |
| Ensuring adequate controls exist |  |  |  |
| Managing our cash and investments |  |  |  |
| Ensuring that we have the right financial performance metrics |  |  |  |
| Ensuring that our billing and collections process is accurate, timely and fair |  |  |  |

**Planning**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Critical** | **Somewhat Important** | **Not Important** |
| Understanding community needs |  |  |  |
| Establishing growth targets and objectives |  |  |  |
| Identifying and understanding trends and issues that will impact [Hospital Name’s] success |  |  |  |
| Developing and executing effective strategic plans |  |  |  |

**Leadership**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Critical** | **Somewhat Important** | **Not Important** |
| Improving governance effectiveness |  |  |  |
| Improving governance education |  |  |  |
| Improving internal communication |  |  |  |
| Improving external communication |  |  |  |
| Improving the workplace climate and employee morale |  |  |  |
| Recruiting qualified and motivated trustees |  |  |  |
| Developing medical staff recruitment, retention and succession planning |  |  |  |
| Developing medical staff leadership |  |  |  |
| Improving overall board leadership |  |  |  |
| Developing management leadership |  |  |  |
| Ensuring the effective execution of plans |  |  |  |
| Developing opportunities for physician integration and partnering |  |  |  |
| Developing opportunities for physician employment |  |  |  |

1. **In which of the following areas does the [Hospital Name] Board of Trustees need to improve its performance in order to ensure that it provides the most effective governance leadership? (Please check all that apply)**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Board self-assessment |  | Financial planning/understanding |
|  | Board member orientation |  | Strategic planning |
|  | Board member succession planning |  | Community outreach |
|  | Building overall board leadership effectiveness |  | Board education |

1. **In what other areas could [Hospital Name] benefit from more effective governance?**
2. **What other factors are vital to [Hospital Name’s]success in the next five years?**

The Board of Trustees Retreat

1. **What do you most want to accomplish at the upcoming board retreat?**

***Thank you for your time and contribution to [Hospital Name’s] strategic thinking. Your input is highly valued.***

***Please submit this survey by 5:00 p.m.   
Day and Date***

**If you have completed a print copy of this survey, please submit it to:**

Office and/or address

Email and/or telephone number