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# Special Report

# Planning Needs Survey

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*Make Decisions, Resolve Conflict, Move Forward*





# Planning Needs Survey

## Resistance to Planning

One of your major challenges as a medical group leader is to help your group develop and implement a long-range plan. Even though a long-range strategic planning process is critical to group success, many groups do not undertake this effort.

In our experience, the number one reason for a lack of strategic planning is physician resistance. As a leader in the organization, it's likely that you recognize the need, but may have difficulty convincing the physician group to devote time, energy and funds to a strategic planning process.

Physician resistance to planning comes from three sources:

- A lack of understanding of the need for, process of, and benefit from strategic planning.
- A desire to avoid dealing with the administrative aspects of the practice.
- Physicians often do not realize the diversity of goals among the members of the practice. This diversity often results in conflict, lack of decision-making and an inability of the leadership of the group to carry out the desires of the group.

Informational materials about the process of and benefits from strategic planning can help overcome the first two sources of resistance (see our Special Report – “Strategic Planning - Strategies for Success”).



To help overcome the third source, and to help you identify if a strategic planning process can help your group, Latham Consulting Group developed the following Planning Needs Survey that you can administer to your group.

## **Purpose of the Survey**

The purpose of the Survey is to obtain information from the physicians and management team about their current satisfaction with practice operations and their long-range objectives. This information can then be summarized and presented to the group as a basis of discussion. In most cases, when groups review this information the group realizes:

- They haven't thought about many of the important issues facing the group; and/or
- There is a significant diversity in the goals for and degree of satisfaction with the practice.

If either or both of these are the case, a strategic planning process can help improve the short and long-range performance of the group.

## **How to Administer the Survey**

For best results, the Survey should be administered as follows:

1. The Survey should be reviewed by the group's leadership to assure that all questions are applicable to the group, and modifications should be made, if necessary.
2. Copies of the Survey should be given to each physician by the manager with a requested completion date. This is often done at a meeting of all the physicians, where the manager can discuss the purpose of the questionnaire and its importance.
3. When the manager receives all of the completed Surveys, the responses should be compiled, with emphasis on identifying where the responses are different.



**If your physicians are concerned about the confidentiality of their answers, or you would like objective feedback and assistance in interpreting your group's responses, Latham Consulting Group can compile the data and provide you with a compiled report. Please contact us if we can be of assistance.**

4. The results should then be presented to the physician group and discussed. If you only send the compilation to the physicians as information it is doubtful that any actions will be taken. If the Survey responses have a high degree of diversity, or there is significant dissatisfaction with the direction the organization is heading, it is up to the manager to suggest the need for a strategic planning process.

As an alternative, many groups are now using on-line survey tools (for example, SurveyMonkey). These tools offer the following advantages:

- They allow for anonymous feedback.
- The survey tool summarizes the information.

If you have any questions about the Survey, or how to administer and interpret it, please do not hesitate to call us.

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As you might expect, our knowledge in this area is based on the fact that Latham Consulting Group has provided **Strategic Planning Facilitation Services** to many medical groups. If we can provide assistance or answer any questions you might have, please contact us at 704/365-8889.



## Planning Needs Survey

**Instructions:** The purpose of this survey is to poll the physicians for their thoughts on major issues facing the group. It will be used to help the group better understand the variances in each member's point of view, especially regarding the group's strengths and weaknesses and plans for the future.

Please take a few minutes to complete this survey and return it to:

\_\_\_\_\_ by \_\_\_\_\_.

The results will be summarized and presented to you at a future meeting date.

### Long Range Plans

	<i>Yes</i>	<i>No</i>
1. I understand our group's long-range plans and where we are heading.		
2. I think we meet often enough to discuss our long-range plans.		
3. I understand the changes taking place in our environment and how our group is adapting.		
4. Our physicians understand and agree on the significant strengths and weaknesses of the group.		
5. Our plans address demographic changes in the community, optimum size for the group, and long-range facilities plans.		
6. Our long-range plans are realistic.		



	<i>Yes</i>	<i>No</i>
7. Our group has an agreed upon "mission statement" which outlines the group's purpose and reason for being.		
8. Our physicians and manager agree on which major projects the group should be pursuing at this time.		
9. Our staff has an excellent understanding of what the physicians want accomplished.		
10. Our physicians normally make decisions in a timely manner and rarely discuss issues over and over again at our meetings.		
11. We are normally pro-active in our actions, rather than reactive.		
12. Our physicians understand the benefits and responsibilities of group practice and why they are in practice together.		

**Key Issues**

13. List the top 5 major issues facing the group over the next 3 to 5 years:

- A. \_\_\_\_\_
- B. \_\_\_\_\_
- C. \_\_\_\_\_
- D. \_\_\_\_\_
- E. \_\_\_\_\_



14. What major issues should the staff focus on over the next year?

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**Decision-making**

15. How does the group make decisions?

- Vote - majority rules
- Consensus
- Dictated by leader(s)
- Other - describe:

16. Are you satisfied with the group's ability to make decisions?

Yes  No

**Communications**

17. Is there good communication between the physicians?

Yes  No

18. Is there good communication between the physicians and the manager?

Yes  No