



# South Milwaukee – St. Francis Health Department 3-Year Strategic Plan 2025-2027

***Empowered to Live Well***

## Purpose of Strategic Planning

Strategic planning is a disciplined process aimed at producing fundamental decisions and actions that will shape and guide what an organization is, what it does, and why it performs those functions. It is a process of assessing a changing environment to create a vision of the future, which aids in determining how the organization fits into the anticipated environment, based on its mission, strengths, and weaknesses. This process sets in motion a plan of action to position the organization for the next 3 years. It takes a look at where we are today, where we want to go as an agency tomorrow and which steps will need to get us there.

## The purpose of the South Milwaukee-St. Francis Health Department Strategic Plan is to:

- Build organizational direction for a three-year period consistent with our vision and mission
- Determine an effective and efficient focused approach to achieve that vision through specific strategies, goals, and objectives
- Formalize the process of envisioning what our organization should be in the future by systemically assessing the environment and our own capabilities
- Become part of a long-term commitment to strategic thinking and operations
- Ensure the most effective use of organizational resources by focusing resources on key priorities
- Build a common vision and language by communicating the strategic plan to leadership, staff, and stakeholders such as the Board of Health and the community
- Be proactive instead of reactive in order to avoid a crisis

## Mission, Vision, Core Values

### Our Vision

Empowered to Live Well

### Our Mission

To lead South Milwaukee and St. Francis in making informed choices through education and prevention.

### Our Fundamental Core Values

- **Communication:** Our staff is respectful, compassionate, and grounded in an ethic of caring with a long-term commitment to our two communities. With education as a primary tenant of our mission statement, we take communication seriously for all our residents and partners. We continuously strive to improve our communication efforts.
- **Respect:** We are advocates for vulnerable populations and work to assure everyone is empowered to live well, whatever their circumstances and determinants require. When residents take responsibility for their health and make informed choices, everyone succeeds. We take our value of respect so seriously, that we seek to act with respect in every situation and with every person we encounter.
- **Teamwork:** We strive to deliver services as a team, whether that is working with a resident one on one, with families, with our partner agencies in our community and throughout the state, and with our other municipal departments.

## Strategic Planning Development Process

Planning for the 2025-2027 South Milwaukee-St. Francis Health Department Strategic Plan began in November of 2024, as the 2022-2024 plan was beginning to wrap up. Staff discussed lessons learned from the prior plan along with direction, ideas, and requests for the next plan. This is an internal plan, where the audience is the health department workforce. The following are the activities that occurred related to our internal Strategic Planning process.

- Key Informant interviews between a health department representative and key community stakeholders
- A SOAR (Strengths, Opportunities, Aspirations, and Results) Analysis with all health department staff members
- An all-staff brainstorming session to determine strategies, goals, and objectives for the plan
- Three all-staff meetings to fine-tune objectives under each strategy and assign leads

## Strategic Plan Living Process

The health department is committed to keeping the strategic plan active and relevant over the next three years – rather than letting it gather dust on a shelf. The plan has been structured around three high-level strategies to ensure it stays focused, realistic, and achievable. To track progress, the health department will:

- Implement a regular review cycle, including:
  - Bi-monthly check-ins to provide updates during all-staff meetings, on even months (February, April, June, August, October, and December)
  - Annual evaluations to reassess and refresh priorities, as needed
- Communicate consistently and transparently:
  - Share updates – both successes and lessons learned – with staff, partners, and stakeholders
  - Celebrate wins by posting them on Facebook, the department website, and when appropriate, through media outlets
  - Twice per year, the Health Officer will present to the Board of Health members and city administrators on the progress of the Strategic Plan
- Remain flexible and responsive:
  - Adjust objectives and metrics as needed to reflect changing circumstances, new opportunities, or lessons learned

## Our Strategies and Goals

### Strategy 1: Enhance Community Engagement

- **Goal 1.1: Inventory existing partnerships and identify new ones to increase health department visibility and impact.** To strengthen its role as a trusted community partner, the Health Department is prioritizing deeper and more meaningful engagement with local organizations, groups, and residents. This goal focuses on building a comprehensive inventory of current partnerships while actively identifying new opportunities for collaboration. By mapping existing relationships and seeking strategic alliances, the Health Department aims to boost its visibility, expand its reach, and amplify the collective impact of public health efforts across the two communities. This foundational work will help ensure resources are aligned, voices are heard, and services are delivered more effectively.

**Goal 1.2: Strengthen health department outreach and engagement with partners and community members.** To broaden its reach and strengthen community connections, the Health Department will focus on building strong, transparent, and responsive communication to foster trust and collaboration. This goal focuses on strengthening the Health Department's communications with both partners and community members. This includes improving the clarity, consistency, and accessibility of messaging across various platforms, as well as creating more opportunities for dialogue. By enhancing how information is shared and feedback is received, the department aims to ensure that its work is more visible, inclusive, and responsive to the needs and priorities of the community it serves.

### Strategy 2: Strengthen Financial Stability

- **Goal 2.1: Investigate alternative funding sources.** A strong and sustainable financial foundation is essential for delivering consistent and effective public health services. This goal focuses on identifying alternative funding sources to diversify the Health Department's revenue streams beyond traditional grants and local funding. By identifying and pursuing new sources of support, the department aims to increase its financial resilience, reduce reliance on any single funding stream, and better position itself to respond to emerging community needs.
- **Goal 2.2: Maximize procedures for billable services.** To make the most of available resources, the Health Department is committed to optimizing its internal processes for generating revenue. This goal focuses on maximizing procedures for billable services by streamlining billing practices, offering equitable payment options, and maximizing reimbursement opportunities. By enhancing efficiency and capturing appropriate revenue, the department can reinvest in programs, expand services, and continue meeting the evolving health needs of the community.

### Strategy 3: Bolster Workforce Development

- **Goal 3.1: Streamline work processes to improve internal communication and continuity of operations.** A strong and efficient workforce is the backbone of effective public health service. This goal focuses on streamlining work processes to enhance internal communication and ensure continuity of operations across the Health Department. By improving workflows and strengthening communication throughout the team, the department aims to reduce inefficiencies, minimize disruptions, and foster a more cohesive work environment. These efforts will help staff stay informed, aligned, and better equipped to deliver high-quality services, even during periods of change or high demand.
- **Goal 3.2: Grow staff skills, knowledge, and training to work together as a collaborative team.** Investing in staff development is critical to building a resilient, high-performing public health team. This goal centers on expanding opportunities for employees to grow their skills, knowledge, and capacity to work collaboratively. This includes providing targeted training, encouraging cross-functional learning, and creating spaces for team-building and shared problem-solving. By fostering a culture of continuous learning and collaboration, the Health Department aims to strengthen teamwork, boost morale, and enhance its overall ability to serve the community effectively.

## Action Plan Framework

The South Milwaukee-St. Francis Health Department Strategic Plan is organized using the following framework:

**Strategy:** Strategies are broad statements of what the South Milwaukee-St. Francis Health Department hopes to broadly achieve in the next 3 years. In all, the South Milwaukee-St. Francis Health Department Strategic Plan identifies three main strategies.

**Goal:** Goals are statements of major approach or methods for attaining strategies and resolving specific issues. In all the South Milwaukee-St. Francis Health Department Strategic Plan identifies six goals between the three strategies.

**Objective:** Objectives are specific, concrete, measurable statements of what will be done to achieve each of the three goals over the next three years. Objectives were developed using the SMART format (Specific, Measurable, Achievable, Realistic, and Timely).

**Resources Needed:** All resources necessary may not be immediately or readily available to achieve an objective, but are listed none-the-less to provide a framework for efficient use of dollars and employee's time that are focused on key priorities.

**Lead:** Identifies the lead person(s) responsible for the objective.

**Projected Due Date:** Identifies the projected due date(s) for each objective in order to assure the Strategic Plan stays on track. When completed, the date should be included but changed to a green font to signify that the objective was completed.

**Measure/Outcome:** This refers to the measurement which will indicate when the goals have been completed. This column will also serve as a place to make brief notes for progress reports or state any needs that should be put into writing in order to ensure accountability.

# South Milwaukee-St. Francis Health Department Strategies, Goals, and Objectives Action Plan

## Strategy 1: Enhance Community Engagement

| Goal  | Objectives   | Resources Needed   | Lead               | Projected Due Date / Completion Date |     |     | Measure/Outcome   |
|---|--|--|--------------------|--------------------------------------|-----|-----|---|
|   |  |  |                    | 25                                   | 26  | 27  |   |
| <b>Goal 1.1: Inventory existing partnerships and identify new ones to increase health department visibility and impact.</b> | <b>1.1a.</b> By December 2025, develop an inventory of annual community engagement events.   | EHR, Jacklyn's list of temporary events  | Melissa            | Dec                                  |     |     | Create "calendar" in Excel, column for topic to focus on, items to be ordered.  |
|   | <b>1.1b.</b> By December 2027, increase number of partnerships by [GOALS set at the end of 2025] in underrepresented sectors identified by the inventory.    | Inventory partnership list   | Group effort       |                                      |     | Dec | Schedule meeting once inventory is developed. Invite businesses that have donated to join our HCP. Tag-along with Jacklyn to inspections. Seek businesses with similar passion to our work – piggy back on initiatives (for example, Bakehouse 23, flyers about free immunizations) |
|   | <b>1.1c.</b> By December 2025, develop an inventory of partnerships, organized by sectors, and set a goal for increase.                                      | "Directory in Excel" in the P drive, vendor lists, HCP list, donors list, Narcan business list | Mary               | Dec                                  | Dec | Dec | <u>Partnership definition:</u> Persons, organizations, or businesses to which we collaborate with to reach a common goal.<br><br>"Partnership mapping" – see notes from Jackie.<br><br>Live document – renewed annually. Created date and updated date.                             |
|   | <b>1.1d.</b> By December 2027, community partners will be identified to co-lead action teams for Community Health Improvement Plan (CHIP) health priorities. | HCP membership, creativity   | Sam                |                                      |     | Dec | Refer to the CHIP.  |
| <b>Goal 1.2: Strengthen health department outreach and engagement with partners and community members.</b>                  | <b>1.2a.</b> By December 2027, provide health department visibility and information regarding services at a minimum of four non-traditional events annually. | Inventory of community events, tabling resources   | Melissa and Laurie | Dec                                  | Dec | Dec | Events participated in.   |
|   | <b>1.2b.</b> By December 2027, increase social media followers and engagement by 20% on Facebook and Instagram.  | Giveaways and more personalized posts  | Mary               |                                      |     | Dec | Followers as of 6/3/25: 1.7k on Facebook and 224 on Instagram.<br><br>Tactics:<br>-Utilize videos and more personalized videos, topics (Michelle camping – ticks)   |

## Strategy 2: Strengthen Financial Sustainability

| Goal   | Objectives   | Resources Needed   | Lead                                      | Projected Due Date / Completion Date |       |     | Measure/Outcome   |
|--|--|--|---|--------------------------------------|-------|-----|---|
|  |  |  |   | 25                                   | 26    | 27  |   |
| Goal 2.1: Investigate alternative funding sources.   | <b>2.1a.</b> By December 2025, review the WALHDAB/WPHA policy and advocacy toolkit to identify ways to advocate for funding.   | Toolkit  | Jackie                                    | Dec                                  |       |     | At least one way will be identified to advocate for funding.                                |
|  | <b>2.1b.</b> By June 2026, create a funding advocacy information sheet for the health priorities defined in the current Community Health Improvement Plan.             | Current CHIP   | Jackie                                    |                                      | June  |     | Information sheet developed.  |
|  | <b>2.1c.</b> By December 2027, submit two potential grant applications annually to support the Community Health Improvement Plan and/or health department programming. | Grant opportunities, grant writing skills, current CHIP, data to support need                | Team                                      | Dec                                  | Dec   | Dec | Applications will be submitted twice per year.  |
| Goal 2.2: Maximize procedures for billable services. | <b>2.2a.</b> By September 2025, apply and verify insurance contracts to maximize insurance reimbursements.   | Credentialing Maven – Leslie, identified insurances  | Jackie, Laurie, and Debbie                | Sept                                 |       |     | In-network contracts and reimbursements.  |
|  | <b>2.2b.</b> By April 2026, integrate the ability to accept credit card payments, benefitting the health department and clientele.                                     | City treasurer requirements, HealthSpace requirements, training, way to process credit cards | Jacklyn, Carina, and Jackie               |                                      | April |     | Credit card payments will be implemented.   |
|  | <b>2.2c.</b> By December 2026, develop policies and procedures for collecting revenue.   | Current procedures utilized, agent contract requirements                                     | Jacklyn, Carina, Laurie, Mary, and Debbie |                                      | Dec   |     | Policies and procedures are developed. Staff education provided on policies and procedures. |

### Strategy 3: Bolster Workforce Development

| Goal  | Objectives   | Resources Needed  | Lead              | Projected Due Date / Completion Date |       |     | Measure/Outcome  |
|---|--|---|-------------------|--------------------------------------|-------|-----|--|
|   |  |   |                   | 25                                   | 26    | 27  |  |
| Goal 3.1: Streamline work processes to improve internal communication and continuity of operations. | 3.1a. By December 2025, develop a plan for standardized file storage.  | Knowledge of all available storage locations (P drive, Teams, Google, Office 365) | Mary and Michelle | Dec                                  |       |     | Development of the plan – written policy.  |
|   | 3.1b. By April 2026, develop an internal communication highway for projects and program updates utilizing technology available to the health department. | Place to host   | Melissa           |                                      | April |     | Details TBD – Microsoft 365 coming soon.   |
|   | 3.1c. By December 2027, review all policies with all staff for streamlining and garnering feedback on policy change needs.                               | System for review   | Jackie            |                                      |       | Dec | A couple policies reviewed per month and discussed, chosen from EHC and public health. |
| Goal 3.2: Grow staff skills, knowledge, and training to work together as a collaborative team.      | 3.2a. By December 2025, create a plan and implement annual staff performance reviews.  | A review tool, annual meetings, focusing on individualized goals                  | Jackie            | Dec                                  |       |     | Annual reviews completed.  |
|   | 3.2b. By June 2026, all staff will have a three-year individualized workforce development plan.  | Needs assessment for each employee, knowledge of opportunities                    | Jackie            |                                      | June  |     | Plans will be developed.   |
|   | 3.2c. By June 2026, establish a system for staff to report out on attended trainings and share learning.   | TBD   | Mary              |                                      | June  |     | System developed.  |