Developing a Strategic Plan

Based on your survey results, formulate goals and objectives for each area needing improvement. For example, let’s say your agency needs to improve its training and staff development. Choose a few activities you can accomplish in the next few months. Assign a realistic timeline and begin working toward those goals. A sample Strategic Plan is included at the end of this section.

Based on each section of the survey, this includes suggested strategies for improving:

- Training and Staff Development
- Agency Capacities
- Health Education for Clients
- Administrative Issues
Strategies for Improving Training and Staff Development

Ongoing training and staff development is essential in improving the way your agency provides culturally and linguistically competent services. All staff should have the opportunity to attend a training or in-service on this topic at least once a year. Be sure to include this topic in the orientation you provide to new staff members.

Consider incorporating some of the ideas below into your agency’s plan to improve its cultural and linguistic competence. Make use of the resources provided with this Toolkit.

- **Encourage staff to attend cultural competency training(s).**
  - Promote outside trainings on the topics of health literacy and cultural and linguistic competency to your staff.
  - Contact your local health department, community groups, and organizations to find trainings in your area.
  - Post a training schedule in the break room.
  - Be flexible with schedules to allow staff to take time away from their duties to attend training.
  - Develop a written policy that states your agency’s commitment to cultural and linguistic competency and your requirements regarding staff training in this area.
  - Set aside resources in the budget to support training and staff development.

- **Provide your own training or in-service on cultural and linguistic competence. Here are some ideas you could incorporate:**
  - Survey employee health beliefs and biases and explore how they can enhance or hinder communication with clients regarding their health issues.
- Use communication techniques and role-plays as a way to give staff skill-building practice in good communication.

- Present information on how social issues, culture, ethnicity, and literacy affect the reproductive health of clients in their community.

- Use exercises on relating to clients who are from a different racial/ethnic/educational group as part of the training. Sometimes people are very culturally competent and comfortable with their own cultural group, but not with other cultural groups. Training and practice can help address this.

- Select a journal article or a video that can be used to jump-start a group discussion on the topic of culture. This type of activity can easily be conducted during the staff lunch time.

  - **Orient all newly hired staff to the importance of cultural and linguistic competency.**

    - Make sure this topic is mentioned in the orientation process and is part of your employee handbook.

  - **Develop a protocol to explain how to work with interpreters while maintaining client confidentiality.**

    - Ensure that this protocol is explained to all staff during orientation.

    - Provide a refresher of the protocol during a staff meeting or in-service.

    - Use the resources in the Resource Section of this Toolkit on how to work with interpreters.

  - **Set up a resource library or section in your office with resources on this topic.** Staff can use these resources to stay abreast of cultural issues in the communities they serve.

    - Purchase or borrow books, videos, and other resources for your agency.

    - Keep them in the break room or develop a library of cultural competency materials that staff can use.
- Focus on obtaining materials that are specific to the populations you serve.
- Develop lists of websites and other resources that would be useful for staff members who want to learn more about cultural competency.
- Review the Resources Section of this Toolkit for specific materials and websites that might be useful.

- **Post articles or subscribe to journals that address the issue of cultural and linguistic competency.** Some suggested publications are American Journal of Public Health, Journal of Cultural Diversity, and Managing Diversity. See the Resource Section of this Toolkit for other helpful journals and websites.

- **Organize activities where staff can share information about their own culture.** One idea is to hold a potluck where staff brings dishes to share that are traditional or common in their culture. Have staff explain what the dish is and when and how it is usually eaten. Be creative!
Strategies for Improving Agency Capacity

Looking at and improving the way your agency provides services to your population groups is an important step in ensuring that your services are culturally and linguistically competent. Some changes you can make are relatively simple, but can make a profound difference. Read through these suggestions. If you are already doing some of these activities, build on your strengths. Consider whether some of these activities could also become part of your overall plan. Make use of the Resources provided in this Toolkit.

- **Make a point of asking clients for their language preference** when they call for an appointment. This will allow time to schedule an interpreter so the client will not have to wait to be seen. Avoid using a family or friend of the client to interpret for you. It may also be helpful to have a list at the appointment desk of clients that routinely use your interpreter services.

- **Encourage staff to record clients’ language preferences** (the language they prefer to speak may be different from the one they can read) on their medical charts so that this information will be accessible to anyone who encounters this client.

- **Post a sign at the reception desk with a list of languages that clients may speak.** Clients can point to the language they speak. Information about where to obtain this type of sign is included in the Resources Section of this Toolkit.

- **Contract with a language line or service to provide interpretation** for languages that your staff do not speak. If you contract with a language line, train staff in how to use the line. Encourage and provide incentives for staff members who speak different languages to become certified medical interpreters. Information about how to go about doing this is included in the Resources Section of this Toolkit.

- **Establish connections with cultural, ethnic, and religious groups in your community.** Visit their organizations and see what services they provide that would be useful for your clients. Develop a list of these resources and distribute them in the clinic. Make sure staff are aware of the resources and use them to make referrals for clients.
Here are other strategies your agency could utilize:

- **Make sure that the pictures, décor and reading materials in your waiting room are welcoming** for people of various cultural groups. You can ask your Community Advisory Board for their input on how to accomplish this.

- **Display signs and posters in the languages that your clients read.** Sometimes this will mean having multiple signs, in different languages, to convey the same message.

- **Consider making changes in your agency’s setting, hours and staffing** that will increase the likelihood that teens will feel more comfortable utilizing your services. Hire peer providers, educators, or outreach workers. Create a teen-friendly waiting room or drop-in clinic.

- **Consider providing early morning, evening or weekend hours to enhance accessibility** for people who are not able to take time off from work or school for an appointment.

- **Consider providing services at convenient off-site locations or with a mobile van.** See “Outreach and Access” in the Resources Section for a practical toolkit on providing off-site services.

- **Find ways to assist your clients with transportation** if that is an issue. See the Resource Section for a helpful report on the topic of outreach.

- **Outreach to clients in a variety of ways,** including the use of media. See the Resource Section for a useful tip sheet and report on this topic.

- **Establish relationships with various groups in your community.** Let them know about your services and programs so they can refer their constituents to your agency.
Strategies for Improving Health Education of Clients

Health education is a core part of the Family PACT program. It is important that you communicate with your clients in a way they can readily understand. This means that the health education materials you provide need to be easy-to-read and in a language your clients can read and understand. The following suggestions will help you improve your services in the area of health education.

- **Offer materials in all the languages your clients read.**
- **Check with ACS for client education materials in the languages your clients read.**
  - ACS provides free health education materials to Family PACT Providers, and some are available in multiple languages.
  - Browse the catalog of client materials online at http://www.familypact.org/providers/client-education-materials/.
  - Place an order by faxing the completed Family PACT Order Form to 1-888-723-3667.
- **Use CFHC’s free Online Database of Health Education Materials to locate materials** based on topic and language from various distributors nation-wide. Go to http://www.healthed.org/Inmagic/SearchCatalog.htm.
- **Establish a Community Advisory Board.** You can assemble the Board with representatives from the cultural, ethnic, and religious groups in your community. Make sure that there are representatives from each of the main cultural groups that your agency serves. Convene the group periodically to get feedback on the materials used or the services provided by your agency.
- **Evaluate the reading level and cultural appropriateness of all forms, surveys, and client materials** using established tools, such as the Fry graph or the sample Checklist for Evaluating Health Education Materials found in the Resource Section of this Toolkit.
- **Train staff and/or Community Advisory Board members to assess the quality of the translation and cultural**
appropriateness of materials. Various consulting groups listed in the Resources Section of this Toolkit can assist you with this objective.

- Ask your clients about their literacy skills and their preferred ways to learn new information. Read information to clients who are not able to read in their own language.

- Give copies of materials to your clients and encourage them to share them with trusted friends, family members or partners. They can read the information to the client and support them on any behavioral change that has been recommended.

Other helpful strategies include:

- Use a variety of teaching tools to present information to clients. You may want to consider providing these clients with audio recordings of the information they need. Pictographic pamphlets and videos can also be useful. To find out more about working with clients who are not able to read, see the Resources Section of this Toolkit.

- For visually impaired clients, provide materials in large print or in Braille if appropriate. You may consider having someone read forms and brochures to the client. As with all clients, ensure that there is a private space for clients to respond if they are answering personal questions.

- For hearing impaired clients, provide interpreters who know American Sign Language (ASL) or provide assisted listening devices. If no staff members know American Sign Language, consider contracting with a translator to provide ASL services. Provide incentives for staff to learn ASL. Assisted listening devices can also be very helpful for both the client and the provider.

- Provide an array of materials and services that would appeal to and meet the needs of various special populations you may serve.
There are many ways the administration of an agency can improve the cultural and linguistic competence of the agency. Supporting the use of this self-assessment tool, for example, is an important first step. It is essential to have protocols for orienting and training staff and an ongoing plan for improving the way your agency provides services to the diverse populations you serve. Here are a few ways that the administration can enhance services to retain and attract new clients.

- **Evaluate your hiring practices.** If your staff members do not reflect the population you serve, consider how your hiring practices may exclude certain groups or give preference to other groups. Evaluate how you could work with community organizations to recruit more staff members that are representative of the clients you serve.

- **Consider presenting demographic information on your client population** and staff during a staff meeting. Explain which groups are most often served by your agency, and to which cultural groups staff members belong. In this way, staff members can learn more about the cultural groups they serve.

- **Think about how your Board of Directors is selected.** It may be that your Board members do not reflect the populations you serve. In that case, consider the process your agency uses to select Board members. Work with community organizations to recruit more Board members who are representative of the communities you serve.

- **Honor and respect staff and clients alike.** Some staff members may not feel that all employees are shown appreciation and respect. If this is the case, agency leadership should consider making needed changes. Specific suggestions for what needs to change could come from focus groups of staff members or from an anonymous suggestion box.

- **Develop a strategic plan.** If your agency does not have a written plan for implementing culturally and linguistically competent services, your agency leadership or Board of Directors should consider developing a strategic plan. Include specific areas...
where your agency would like to improve, set goals and objectives, and explain strategies and activities that will help you achieve these goals. You can use this Toolkit as a way to begin.

- **Consider policy and procedure change.** Policies and procedures are the framework of the Strategic Plan that will guide broader systems change in your agency. Policies are the formal guidelines an agency uses to coordinate and execute their activities. They help focus attention and resources on high priority issues. Procedures are the operational processes used to implement policies. If policy is “what” your agency does operationally, then its procedures are “how” you intend to carry out those operating policies.

Your agency can also:

- **Inform your staff of your agency's strategic plan.** Once you have a written plan, make sure staff is aware of it by including discussion about it in your orientation process, during staff meetings or in-service trainings or by occasional memorandums.

- **Create a way to deal with clients’ concerns or complaints.** If your agency has a written policy to address client concerns or complaints but staff members are not aware of it, you may need to remind or inform staff of the policy during a staff meeting or by providing a brief training. If your agency does not have a written policy regarding complaints, your agency leadership or Board of Directors should consider developing a grievance system. Include specific steps clients can take to file a complaint as well as the process the agency will use to respond to these complaints. Make sure staff and clients are aware of this process.

- **Annually assess your progress.** If your agency annually assesses progress in implementing culturally and linguistically competent services but staff members are not aware of it, you may need to remind or inform them of the process during a staff meeting.

- **Incorporate cultural and linguistic competence assessment into your annual report.** Consider including an annual assessment of culturally and linguistically appropriate services as part of your annual report as a way to assess progress. Use your written plan for implementing culturally and linguistically appropriate health care services to see if you are meeting the goals that you set for your agency.
Using the Strategic Plan Form

So, now what? Once you have tallied your survey results, determined your average score for each section, and read through the various suggestions in the Toolkit for improving your agency’s cultural and linguistic competency, what can you do?

It is important to gather staff members together to:

- Discuss what to do with all the information.
- Make a personalized plan based on your agency’s most pressing needs and available resources.

You can use the following form entitled “Strategic Plan” to assist you in formulating a plan.

- For each section of the survey, record your agency’s final average score.
- Read “Understanding Your Scores” to interpret that score. Record your notes about your survey results in the box next to the score.
- Brainstorm with staff about what your agency can realistically do to improve things. Remember, even making small steps can make a big difference.
- Then, under “Proposed Activities” for each section, write one to three activities your agency can commit to doing in the next few months. You can choose activities suggested in this section, or you can develop your own.
- Consider ways you can turn your “Proposed Activities” into “Policy Change” by either modifying an existing policy or creating a new one. You can check the box “Needs policy change” if you think your new activities require it.

See the next few pages for an example of how one agency developed a plan. A blank copy of the Strategic Plan form is also included for your use.
### Enhancing Linguistic and Cultural Competency

### Strategic Plan

**Name of the Agency:** Eastside Clinic  
**Date:** 6/30/07

#### Section One: Training and Staff Development

<table>
<thead>
<tr>
<th>Score</th>
<th>Notes on Results</th>
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<tbody>
<tr>
<td>6</td>
<td>Needs further improvement. Survey showed that some staff have not had training recently.</td>
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**Proposed Activities:**

1. **By September 2007:** Present a session on the issue at our all-staff retreat.

2. **By September 2007:** Allocate funds; assign staff and training videos on health literacy and cultural competence.

3. **By 2008:** Explore ways to fund outside training opportunities for staff.

#### Section Two: Agency Capacities

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<th>Score</th>
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<tr>
<td>7</td>
<td>We're doing good, but we're reminded of a few ways we could improve.</td>
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**Proposed Activities:**

1. **By September 2007:** Order and post "I speak" cards near the reception area.

2. **By:**

3. **By:**

---

OFP Contract 05-45389  
FY2006-2007  
Prepared by CFHC, 2007
Enhancing Linguistic and Cultural Competency

STRATEGIC PLAN

Name of the Agency: Eastside Clinic

Date: 6/30/07

Section Three: Health Education

Score: 2

Notes on Results: Improvements are highly recommended. There's a lot we don't take into consideration.

Proposed Activities:

1. By 7 month 2007 year we will: go online to FamilyPACT.org and order materials through the catalog.

2. By 8 month 2007 year we will: make a list of materials we need and in which languages.

3. By 8 month 2007 year we will: make a plan to evaluate the materials we already have that aren't from FamilyPACT.

Section Four: Administrative Issues

Score: 4

Notes on Results: Further improvement needed. Some staff members aren't informed.

Proposed Activities:

1. By 9 month 2007 year we will: present our new strategic plan at our fall staff meeting.

2. By 9 month 2007 year we will: ask for staff feedback at the meeting about how we can enhance our services.

3. By month year we will:
### Section One: Training and Staff Development

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**Proposed Activities:**

1. By ________, ________, we will:  
   | month | year |
   |       |      |
   □ Needs Policy Change

2. By ________, ________, we will:  
   | month | year |
   |       |      |
   □ Needs Policy Change

3. By ________, ________, we will:  
   | month | year |
   |       |      |
   □ Needs Policy Change

### Section Two: Agency Capacities

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**Proposed Activities:**

1. By ________, ________, we will:  
   | month | year |
   |       |      |
   □ Needs Policy Change

2. By ________, ________, we will:  
   | month | year |
   |       |      |
   □ Needs Policy Change

3. By ________, ________, we will:  
   | month | year |
   |       |      |
   □ Needs Policy Change
### Section Three: Health Education

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**Proposed Activities:**

1. **By _________, _________, we will:**
   - month
   - year
   - Needs Policy Change

2. **By _________, _________, we will:**
   - month
   - year
   - Needs Policy Change

3. **By _________, _________, we will:**
   - month
   - year
   - Needs Policy Change

### Section Four: Administrative Issues

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**Proposed Activities:**

1. **By _________, _________, we will:**
   - month
   - year
   - Needs Policy Change

2. **By _________, _________, we will:**
   - month
   - year
   - Needs Policy Change

3. **By _________, _________, we will:**
   - month
   - year
   - Needs Policy Change