

# Immunization Information Systems (IIS) Business Plans

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## 2015 IPOM Required Activity

**D-5: Assure that annual IIS planning documents are developed or updated.**

### ***Required Activities:***

- 1) Develop a written five-year strategic plan (2013 – 2017) to include a needs assessment, vision and goals, compliance with IIS Functional Standards, and a monitoring and evaluation\* plan by March 31, 2013.
- 2) For the first and each subsequent year, propose activities, timeline, and a budget designed to meet the specific goals for that year. Include all non-317 resource requirements (e.g., Medicaid, in-kind, state). Include a monitoring and evaluation\* plan with indicators, metrics, and assigned resources.

*\*This evaluation plan is a distinct, separate plan from the evaluation requirement in Required Objective B5.*



# Strategic Plan vs. Business Plan

## ❑ Strategic Plan

- Long term (3 to 5 years)
- Futuristic in nature
- Sustainability

## ❑ Business Plan

- Short term (about 1 year)
- Covers operational issues – goals, objectives, constraints
  - Resources needed to achieve goals and objectives
    - Funding
    - Staffing

## ❑ CDC recommends that IISs develop business plans



## Why Write an IIS Business Plan?

- ❑ **IIS development and operations is complex, resource-intensive**
- ❑ **Assists with operations planning**
- ❑ **Helps your program determine if:**
  - Goals and objectives are achievable with available resources
  - Available resources are sufficient to meet requirements
- ❑ **Provides a narrative description of your program that can be shared with internal/external stakeholders**



# Components of a Well-Written IIS Business Plan

## ❑ Vision Statement

- Desired state of being

## ❑ Mission Statement

- How you will achieve the vision/desired state

## ❑ Environmental Scan

- SWOT analysis (Strengths, Opportunities, Weaknesses & Threats)
- Documentation of stakeholder feedback/input
- Needs Assessment
- Constraints



# Components of a Well-Written IIS Business Plan

## ❑ Gap Analysis

- Crosswalk of your current IIS functions against those that need to be developed
  - CDC's IIS Functional Standards, 2013 – 2017
  - Other documented system requirements

## ❑ Goals

- Overarching, general

## ❑ Objectives

- Precise, clear



# Components of a Well-Written IIS Business Plan

## ☐ **Activities**

- With responsible parties

## ☐ **Metrics**

- How you will know you achieved your goals and objectives

## ☐ **Staffing Plan**

- Org chart, position descriptions

## ☐ **Budget**



# Characteristics of a Well-Written IIS Business Plan

- ❑ **Concise**
- ❑ **The goals, objectives, and activities are:**
  - logical and consistent with the vision, mission, and environmental scan
  - ambitious yet reasonable given the budget and staffing available
- ❑ **The metrics are clear, meaningful and logical and will accurately measure progress**
- ❑ **Someone with little knowledge of your program can read the plan and understand clearly what you are doing and why**





## Example: Vision Statement

- ❑ Idealized description of a desired outcome that inspires and energizes
- ❑ Helps you create a mental picture of your target

All NYC residents across the lifespan are appropriately immunized and have a complete record in the Citywide Immunization Registry (CIR)



## **Example: Mission Statement**

- ❑ **HOW you will achieve the desired state of being in your vision statement**
- ❑ **Represents the program's purpose for existence**

To improve the immunization status of New York City (NYC) residents by consolidating immunization information and sharing it with health care providers, families, individuals, schools, and agencies concerned with health



## Example: Goal

- ❑ **Overarching and general**
- ❑ **Describes a desired high-level outcome**

### Focus Area 2, Goal 1:

The CIR supports the Bureau of Immunization (BOI), other Department of Health and Mental Hygiene (DOHMH) bureaus, other organizations and agencies, providers, and the public for the purpose of improving immunization coverage



## Example: Objective

- ❑ **Specific and detailed**

Focus Area 2, Goal 1, Objective 1:

Increase VFC accountability through generating VFC Doses Administered Reports (DARs) through the CIR, informing providers of their DARs, and linking VFC vaccine distribution to DARs



## Example: Activities

- ❑ **Even more specific, identifying specific action items and can include metrics**

Focus Area 2, Goal 1, Objective 1, Activities 1-3:

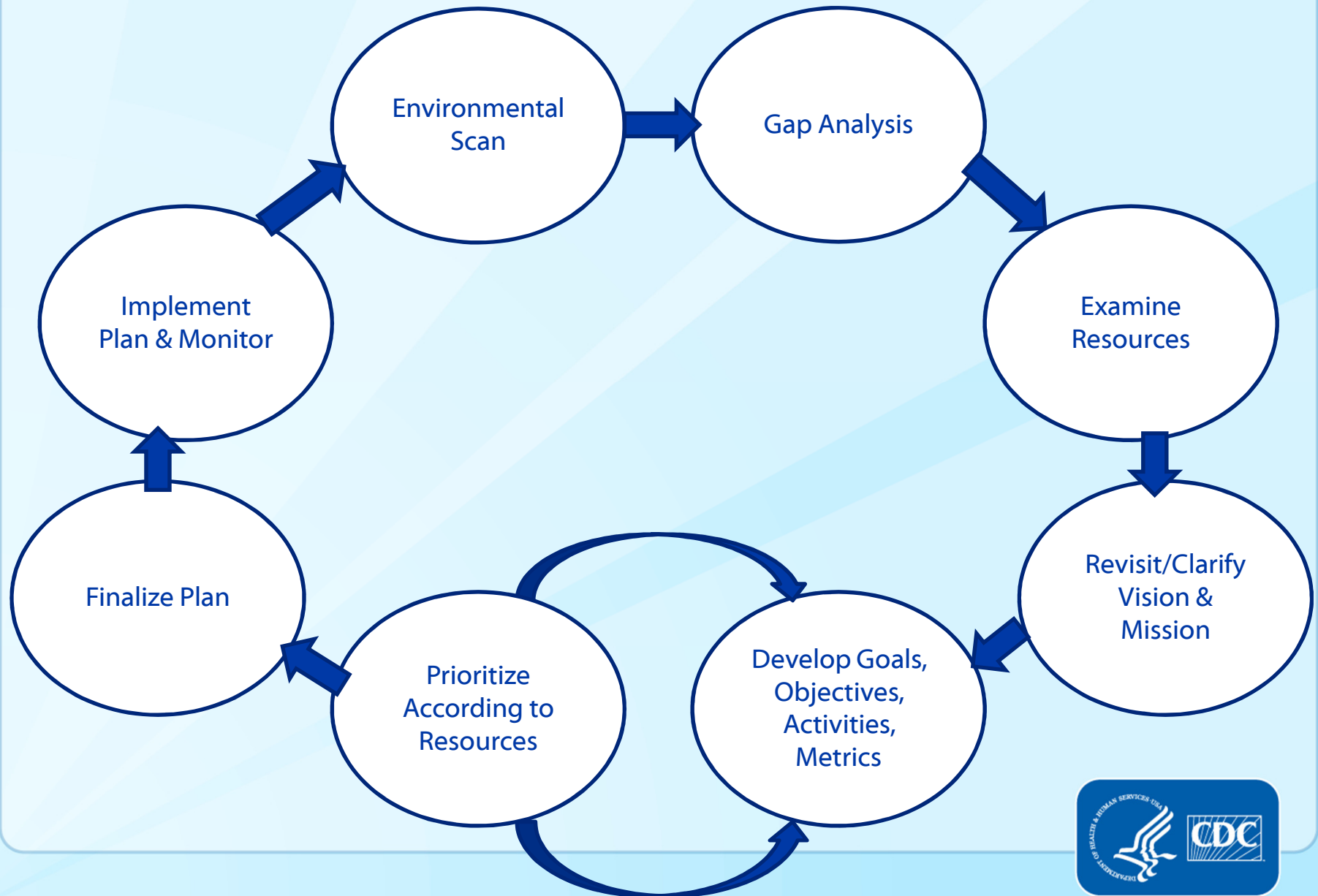
- 1) Send letters and reports, including VFC DARs, to all pediatric provider sites on a quarterly basis with reminder of BOI policy (i.e., meet the 90% DAR target or be subject to reduced VFC vaccine shipments).
- 2) Conduct outreach to providers with DARs  $\leq$  80% to assist in resolving reporting problems, over-ordering, or other issues affecting DARs
- 3) Support PQA unit staff in implementing VFC compliance site visits



## Other Components

- ❑ **Executive summary**
- ❑ **Background or history**
- ❑ **Partnerships**
- ❑ **System diagrams**
- ❑ **Key statistics**
- ❑ **Saturation measures**
- ❑ **Areas of focus**
- ❑ **Methods for calculating metrics**
- ❑ **GANTT charts**

# Business Plan Development Process Cycle



## Resources

- ❑ **Examples available from your IIS colleagues**
- ❑ **Internet**
- ❑ **Your IISB consultant**





# **IISB Operations Team**

## **Assignee List**

<http://www.cdc.gov/vaccines/programs/iis/contacts-technical.html>



# Thank You!

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The findings and conclusions in this report are those of the authors and do not necessarily represent the official position of the Centers for Disease Control and Prevention.

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