



## STRATEGIC PLANNING APPLIED ON THE PUBLIC SECTOR: THE SUB SECRETARIAT OF ADMINISTRATIVE AFFAIRS CASE

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### Abstract

**Objective of the study:** build a strategic planning for a public sector entity - the Sub secretariat for Administrative Affairs (SAA) within the Ministry of Health - in order to allow its administrators to control and evaluate their work processes and enable the integrated management of their general coordination, observing the alignment of its superior planning.

**Methodology / approach:** a strategic planning cycle based on the consolidation of literature applied to the public sector is applied in a six-step flow. With a qualitative approach, it refers to a case study and action research, in which the researchers assumed the role of facilitators of the process together with the team of managers of the researched entity.

**Originality / Relevance:** the research promotes a factual system, based on the interests and needs of the entity's managers, responding to the internal demands of the environment. In addition, the importance of conducting planning for defining the future and strategy in public sector entities is highlighted, in order to promote the improvement in the provision of services to the population and allow the evaluation of the results achieved.

**Main results:** in addition to the mission, vision, values and analysis of the environment, a strategic plan was prepared consisting of 11 objectives and a set of 70 actions and strategic indicators effective until the year 2023, forming a relevant performance dashboard.

**Theoretical / methodological contributions:** the provision of subsidies for the strategic development stands out, in order to constitute elements considered essential to be included in its construction process.

**Social / management contributions:** the construction of the model is based on the perceptions of the people involved in the SAA management process and on the alignment with the planning of the Health Ministry. Therefore, the built model contributes to the achievement of the Ministry's own strategic objectives, providing synergy and a common direction to the entity.

**Keywords:** Strategic planning. Public sector. Strategic Map. Performance Dashboard.

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## PLANEJAMENTO ESTRATÉGICO APLICADO AO SETOR PÚBLICO: O CASO DE UMA SUBSECRETARIA DO MINISTÉRIO DA SAÚDE

### Resumo

**Objetivo do estudo:** construir o planejamento estratégico para uma unidade do setor público - a Subsecretaria de Assuntos Administrativos (SAA) do Ministério da Saúde - de modo que permita aos seus administradores o controle e a avaliação dos seus processos de trabalho e possibilite a gestão integrada de suas coordenações-gerais, observando o alinhamento do seu planejamento superior.

**Metodologia / Abordagem:** trata-se da aplicação do ciclo de planejamento estratégico baseado na consolidação da literatura aplicada ao setor público em um fluxo de seis etapas. De abordagem qualitativa, refere-se a um estudo de caso e pesquisa-ação, no qual os pesquisadores assumiram o papel de facilitadores do processo junto à equipe de gestores da unidade pesquisada.

**Originalidade / Relevância:** a pesquisa promove um sistema factual, baseado nos interesses e necessidades dos administradores da unidade, respondendo a demandas internas do ambiente. Além disso, destaca-se a importância da realização do planejamento para as definições de futuro e de estratégia nas entidades do setor público, de modo a promover a melhora na prestação de serviços à população e permitir avaliar os resultados alcançados.

**Principais resultados:** além da missão, visão, valores e análise de ambiente, elaborou-se um planejamento estratégico composto por 11 objetivos e um conjunto de 70 ações e indicadores estratégicos com vigência até o ano de 2023, formando um relevante painel de desempenho.

**Contribuições teóricas/metodológicas:** destaca-se o fornecimento de subsídios para o desenvolvimento estratégico, de modo a constituir elementos considerados como essenciais para serem incluídos no seu processo de construção.

**Contribuições sociais / para a gestão:** a construção do modelo se baseia nas percepções das pessoas envolvidas no processo de gestão da SAA e no alinhamento com o planejamento do próprio Ministério da Saúde. Logo, o modelo construído contribui para o alcance dos objetivos estratégicos do próprio Ministério, fornecendo sinergia e um direcionamento comum à unidade.

**Palavras-chave:** Planejamento Estratégico. Setor Público. Mapa Estratégico. Painel de Desempenho.

## PLANIFICACIÓN ESTRATÉGICA APLICADA AL SECTOR PÚBLICO: EL CASO DE UNA SUBSECRETARIA DEL MINISTERIO DE SALUD

### Resumen

**Objetivo del estudio:** construir la planificación estratégica para una unidad del sector público - la Subsecretaría de Asuntos Administrativos (SAA) del Ministerio de Salud - con el fin de permitir a sus administradores controlar y evaluar sus procesos de trabajo y posibilitar la gestión integrada de su coordinación general, observando el alineamiento de sus planificación superior.

**Metodología / abordaje:** se aplica un ciclo de planificación estratégica basado en la consolidación de literatura aplicada al sector público en un flujo de seis pasos. Con un enfoque cualitativo, se refiere a un estudio de caso e investigación acción, en el que los investigadores asumieron el rol de facilitadores del proceso junto con el equipo de gestores de la unidad investigada.

**Originalidad / Relevancia:** la investigación promueve un sistema fáctico, basado en los intereses y necesidades de los gestores de la unidad, respondiendo a las demandas internas del entorno. Además, se destaca la importancia de realizar una planificación para la definición de futuro y estrategia en las entidades del sector público, con el fin de promover la mejora en la prestación de los servicios a la población y permitir la evaluación de los resultados alcanzados.

**Principales resultados:** Además de la misión, visión, valores y análisis del entorno, se elaboró un plan estratégico compuesto por 11 objetivos y un conjunto de 70 acciones e indicadores estratégicos con vigencia hasta el año 2023, conformando un relevante tablero de desempeño.

**Contribuciones teóricas / metodológicas:** se destaca la provisión de subsidios para el desarrollo estratégico, a fin de constituir elementos considerados esenciales para ser incluidos en su proceso de construcción.

**Contribuciones sociales / para la gestión:** la construcción del modelo se basa en las percepciones de las personas involucradas en el proceso de gestión del SAA y en la alineación con la planificación del Ministerio de Salud. Por tanto, el modelo construido contribuye a la consecución de los objetivos estratégicos propios del Ministerio, aportando sinergia y una dirección común a la unidad.

**Palabras-clave:** Planificación estratégica. Sector público. Mapa Estratégico. Tablero de desempeño.

## 1 INTRODUCTION

Strategic Planning (SP) is a systematic process that charts the course of action for an organization over a specific period. This initiative-taking approach involves conducting a comprehensive environmental analysis to grasp both internal and external conditions, followed by a strategic diagnosis to pinpoint the envisioned future. Subsequently, strategic goals, actions, and indicators are formulated to facilitate the realization of this envisioned future (Bandeira & Amorim, 2020; Poister & Streib, 2005; Salkić, 2014).

Multiple scientific studies have demonstrated that Strategic Planning (SP) components serve as the primary management tool adopted by organizations, yielding a high satisfaction rate among users (Feitoza & Ferreira, 2021; Höglund et al., 2018; Pereira, 2010; Rigby & Bilodeau, 2018). SP is not only a fundamental and necessary tool for establishing a strategic process methodology but also plays a pivotal role in fostering organizational participation. Amidst various possible paths, organizations collectively choose a coordinated route to pool efforts and enhance overall performance (Salazar & Cerda, 2018).

The SP process comprises systematic and continuous steps that drive a continuous flow of improvement. These steps, including conception, implementation, control, and evaluation, result in an upward spiral of organizational performance (Ugboro et al., 2011). The relevance of this process becomes evident when considering the array of benefits it bestows upon organizations, such as the definition of mission and vision, encouragement of strategic thinking, enhancement of decision-making processes, heightened organizational proactivity, promotion of organizational alignment, stimulation of interaction, consistency in performance, focus on results, and the fostering of continuous improvement (Pereira, 2010; Salazar & Cerda, 2018; Salkić, 2014). In this context, the planning process emerges as a catalyst for institutional sustainability (Melo, 2013; United Nations, 2010).

Bandeira & Amorim (2020) emphasize that the integration of SP has become increasingly prevalent in public administration. This trend is particularly notable due to the shift from the traditional management model to the managerial model, which prioritizes efficiency, efficacy, and effectiveness. The SP methodology facilitates the comparison and evaluation of results, enabling the correction of performance and aligning with the principles of the managerial model.

Höglund et al. (2018) emphasize that the implementation of SP within the realm of public administration is not without its challenges. They stress the essential nature of a collective perspective on strategy for public managers, especially considering the imperative to

define an organization's stance in an unpredictable and complex future. In this regard, the adoption of SP serves as a valuable tool, enabling the directed allocation of attention and resources towards prioritized objectives (Bryson & Roering, 2018; Bryson & Edwards, 2017; Johnsen, 2015; Poister, 2010; Poister et al., 2010).

To implement a SP successfully, an organization must comprehensively understand its current situation, define its objectives, identify necessary actions, and anticipate the effects of these actions on the organizational environment. Adherence to these stages is critical for the effective completion of the SP process. Recognizing the significance of SP for diverse organizations, particularly those in the public sector, this study addresses the research problem: How can SP be developed in a public sector entity, considering a holistic perspective of an organizational unit?

In addressing the defined research problem, the objective of this article is to develop a SP for a public sector entity, specifically the Sub secretariat of Administrative Affairs (SAA) within the Ministry of Health (MH). The aim is to provide administrators with a tool for controlling and evaluating work processes, fostering institutional sustainability through integrated management, and ensuring alignment with overarching planning. To achieve this objective, we utilized the SP cycle consolidated by Matos et al. (2023), enabling the development of steps and the completion of the model.

The justification for conducting this study is grounded in its relevance and feasibility, as argued by Castro (1977). The study is deemed relevant because it will provide a concrete system tailored to the interests and needs of the administrators within the unit, addressing internal environmental demands. Höglund et al. (2018) highlight the scarcity of knowledge regarding the application of strategic management at the micro level, particularly concerning the tools used in strategy development, especially in the public sector. They underscore the significance of adopting a strategic vision grounded in practical activities and processes. Olivier further supports this sentiment et al. (2018), who emphasize the inadequacy of studies in this field, especially in comparison to the private sector, underscoring its heightened importance.

Moreover, scientific literature underscores the significance of conducting planning to delineate the future and strategy in public sector entities. This practice is vital for enhancing service delivery to the population and facilitating the evaluation of achieved results (Demirkaya, 2015; Hîntea, 2008; Poister et al., 2010; Saari, 2018), thereby generating societal value. SP involves a forward-looking analysis, encompassing both objective and subjective considerations of goals and priorities within a perpetually changing external environment (Drumaux et al., 2007). The feasibility of this endeavor is further underscored by the SAA

manager's and MH's intrinsic interest in constructing a customized model. Such a model serves to support decision-making processes and provides a holistic and integrated visualization of the organizational structure.

The utilization of SP in the public sector plays a pivotal role in advancing academic literature, offering numerous contributions (Teisman & Klijn, 2008). It provides a methodological and analytical framework that empowers researchers to conduct more comprehensive investigations into the interactions between organizational strategy and outcomes achieved, fostering theoretical and empirical depth in academic studies on strategy (Henderson & Mitchell, 1997). As public managers and organizations implement and refine their strategies, a multitude of challenges and opportunities emerge, providing fertile ground for investigation and documentation. This, in turn, contributes to the generation of new and updated knowledge in the field.

## **2 THEORETICAL BACKGROUND**

The term 'strategic planning' encompasses a set of procedures by which organizations establish long-term directions for their objectives and formulate strategies to achieve these goals, considering significant internal and external variables (Hințea, 2008; Matos et al., 2023; Ugboro et al., 2011). It is imperative that planning be viewed as a continuous process oriented towards action (Poister, 2010). This approach serves as a deterrent to organizational failure and poor performance (Pangarkar, 2015), guiding the organization to attain its objectives through a pre-established routine (Mintzberg, 1990).

SP found its way into public administration in the mid-1980s, drawing inspiration from strategies employed in the private sector (Höglund et al., 2018; Fonseca et al., 2013; Poister & Streib, 2005; Poister et al., 2010; Rezende & Ultramari, 2007). Although SP originated in the private sector with its unique principles and characteristics, its adaptation to the public sector is feasible, provided it is appropriately adjusted to the specificities of public institutions, ensuring coherence with their objectives and functions (Albuquerque & Carrillo, 2010; Fonseca et al., 2013). The decision to delve into the SP theme within the public sector underscores the imperative to advance studies in this domain, which remain insufficient when compared to the private sector (Olivier et al., 2018). This focus is driven by issues ranging from competition and competitive advantages to the efficacy of services rendered to society, particularly in response to rapid environmental changes and escalating social demands (Alonso, 2010; de Araújo & Gonçalves, 2011; Drumaux & Goethals, 2007; Ugboro et al., 2011).

Enhancing organizational performance stands as a paramount objective for both public and private sector entities, given the imperative of optimizing available resources and fulfilling their mandated activities. In the case of public institutions, the focus of SP should be directed towards performance improvement, evidenced through the effective meeting of social demands, precision and transparency in information dissemination, and the coherence of actions. Constructing an instrument aligned with strategic peculiarities enables the visualization of diverse objectives, aids in decision-making, and, critically, facilitates the development of an action plan conducive to a task's success, thereby supporting institutional sustainability (Bandeira & Amorim, 2020; Drumaux & Goethals, 2007; Fernandes et al., 2016; George, 2020; Melo, 2013; Mesquita et al., 2018; Salkic, 2014).

In the process of constructing SP in the public sector, spaces for collective reflection and forums for technical discussion are established. This participation is deemed essential, aiming to enhance the ability to analyze the internal and external environments' situations and demands. Moreover, it plays a crucial role in fostering greater acceptance and commitment to plan changes resulting from this collective engagement. The goal is to ensure that planning unfolds holistically, aligning with collective interests, and in accordance with the established mission and vision (Albuquerque & Carrillo, 2010; George, 2020; Höglund et al., 2018; Mesquita et al., 2018; Poister & Streib, 2005).

SP in the public sector entails various particularities, including scope, breadth of focus, time horizon, multiplicity of objectives, instability of coalitions, isomorphism (acceptance and dissemination of specific management practices), cultural traits of formalism, and the extent of information collection. These aspects demand meticulous consideration during the development and implementation phases, given the specificities of public organizations (Poister et al., 2010; Randeree & Youha, 2009). The authors further highlight that the effectiveness of different approaches is contingent upon the organizations where they are implemented and the specific challenges they encounter.

Hence, public organizations ought to leverage SP as a tool to attain enhanced management outcomes, whether in the efficiency of public spending or in serving citizens and society. This utilization should always align with public policies and standards governing their respective sectors, allowing for continuous monitoring (Corrêa, 2007; Da-Fonseca et al., 2014). Nevertheless, caution is warranted during the deployment of this tool, as challenges may manifest before and throughout the process. In this context, adopting a systematized process led by a team well-versed in SP mechanisms proves valuable. Such a team can contribute to the construction of a practical instrument, considering crucial aspects for the organization's

constituents and ensuring the effectiveness of the formulated strategy (Olivier et al., 2018; Saari, 2018).

Within this context and considering the specific literature on SP applied to public management, it is imperative to address existing gaps. Efforts should be directed toward understanding the participation of various stakeholders in the planning construction process and measuring the achieved results. This approach facilitates the development of insights into the accomplishment of formulated strategies and the resultant changes stemming from management decisions via SP.

### 3 METHODOLOGICAL PROCEDURES

To address the objective outlined in this study, a qualitative approach was employed, utilizing technical procedures associated with a case study and action research (Yin, 2018). The researchers assumed the role of facilitators during the construction of the SP in the organization. They were actively involved in data collection, instrument development, preparation for implementation, and achievement of results in a purposeful manner throughout the research process (Gray, 2021).

The research was conducted within the context of the SAA of the Ministry of Health. This sector is primarily responsible for overseeing processes and organizational structures, managing personnel, and handling information units, documents, and administrative affairs. The purpose of constructing a Strategic SP system for the unit was to provide its managers with control and evaluation capabilities for their work processes, in accordance with MH guidelines. Despite the existence of a prior SP outlined for the period 2016-2018, it lacked complete alignment with MH planning. Consequently, the planning was developed for the four-year period 2020-2023, following the Ministry of Health's (2021) own SP.

The organizational structure of the SAA encompasses a set of general coordination tasked with decentralizing activities in specific areas. The composition of SAA includes: i) General Coordination of People Management (COGEP); ii) General Coordination of Budget and Finance (CGOF); iii) General Coordination of Process Innovation and Organizational Structures (CODIPE); iv) General Coordination of Architecture and Engineering (CGENG); v) General Coordination of Documentation and Information (CGDI); vi) General Coordination of Monitoring and Execution of Administrative Contracts (CGCON); and vii) General Coordination of Material and Heritage (CGMAP). Thus, all these coordination were actively involved in the process of constructing the strategic planning instrument.

To foster broad participation from the stakeholders involved in the operations of the SAA in the development of the SP, a designated group was entrusted with the decision-making process regarding its constituent elements (Fonseca et al., 2013). This initiative led to the formation of a Strategic Forum comprising all managers, including the subsecretary and general coordinators. The purpose of this forum is to deliberate on all stages of the SP cycle. The responsibility for constructing the SP lies with the team of facilitators, tasked with supporting the SAA team throughout the implementation of the adopted methodology, based on the SP cycle proposed by Matos et al. (2023).

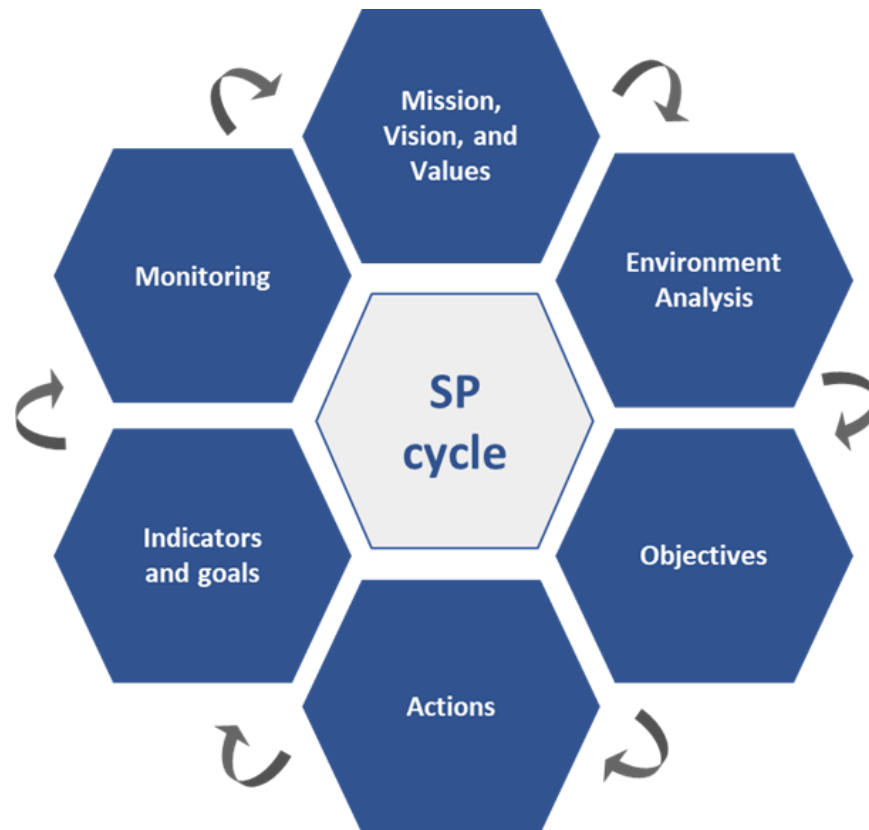
The construction of the SP unfolded in a participatory manner, with contributions from all general coordination. Facilitators collected information using electronic spreadsheets, which were then consolidated and analyzed based on each stage of the process. Consequently, as each planning stage was developed, with the identification of needs and directions by managers, the facilitators validated them with the Strategic Forum. Following the validation of one step, the process proceeded to the next until all stages were successfully completed.

The SP development cycle, as outlined by Matos et al. (2023), unfolds through six stages in a systematic flow, as depicted in Figure 1. In this context, the facilitators lead the progression through these stages, ultimately delivering a strategic plan that encapsulates the generated elements and facilitates the monitoring of the execution of defined strategies. Specifics regarding the execution of each stage, along with the underlying principles guiding these operations, will be expounded upon in the results section.



**Figure 1**

*Strategic planning development cycle*



Source: translated from Matos et al. (2023, p. 14).

## 4 RESULTS

The SP development process for the SAA within the Ministry of Health, covering the four-year period 2020-2023, initiates with the validation of the methodological proposal for construction. The SP cycle advocated by Matos et al. (2023) was adopted for this purpose. The validation of the proposal engaged SAA managers, facilitated through its Strategic Forum, along with individuals responsible for the affected areas within the unit. Subsequent to the validation of the methodology, the construction process commenced with the team. To ensure alignment between SAA's SP and that of the Ministry of Health (2021), an analysis was conducted on various aspects of the MH strategic plan, including mission, vision, and values, perspectives, and strategic objectives. This set of elements served as a foundation for reference throughout the development of SAA's planning process.

In accordance with Matos et al. (2023), the initial stage involved the definition of the mission, vision, and values for the SAA. The institutional mission is intended to contribute to the design, application, and development of policies, plans, and programs (Salazar & Cerda,

2018). To achieve this, a workshop was conducted, based on the decision of the Strategic Forum, utilizing the planning structure from 2016 to 2018 as a foundation for review and adaptation. The previous mission statement for SAA was “To provide units of the Ministry of Health with administrative solutions and resources that enable the implementation of health policies and improve the SUS” (SAA/SE/MH, 2017). Following a thorough debate with the active participation of all members of the Strategic Forum, three proposals were presented, resulting in the definition of the new mission: “Provide solutions and resources for the implementation of Ministry of Health policies aimed at improving the SUS”.

Conversely, the institutional vision embodies an aspiration for long-term impact, representing the envisioned scenario for the institution. The formulation process mirrored that of the mission. The previous vision of SAA (2016-2018), “Being recognized for efficiency in the administrative management of the Ministry of Health, acting in a planned and proactive manner”, was presented alongside the Ministry of Health's vision of “Effective and recognized Public Health System” (Ministry of Health, 2021, art. 3), underscoring the importance of aligning SAA's vision with that of MH. A discussion ensued regarding which points might be obsolete and solicited the team's perceptions regarding the vision. Some general coordination expressed the view that the existing vision remains relevant but emphasized that the themes of integration and decentralized units, currently prominent at the Ministry of Health, were not explicitly included. Consequently, the Strategic Forum decided to incorporate the term 'integration' into SAA's vision. Two vision options were proposed, and the following statement was defined and validated: “To be recognized for the efficiency in the administrative management of the Ministry of Health, acting in a planned manner, integrated, and proactive”.

Concluding the first stage of the planning process, institutional values were defined, representing the ideals that should guide individuals' attitudes and behaviors in realizing the purposes established in the strategy (Salazar & Cerda, 2018; Matos et al., 2023). The participation of all SAA managers in the process involved proposing three values each. These proposals were then grouped based on similarity, ultimately consolidating into seven values: commitment, integration, transparency, resoluteness, excellence, ethics, and innovation.

The second stage of constructing the SP involves the study and analysis of the environment, considering both the internal and external contexts. A combined approach utilizing two methodologies, SWOT and PEST, was employed for this analysis. Regarding the SWOT methodology, the analysis was bifurcated into the internal environment, encompassing strengths and weaknesses, and the external environment, involving opportunities and threats (Albuquerque & Carrillo, 2010; Mesquita et al., 2018). The PEST methodology was integrated

by introducing four guiding aspects for analyzing the external environment, focusing on the political, economic, social, and technological contexts (López et al., 2018; Martinez et al., 2018; Zumaeta et al., 2019). To maintain symmetry in the instrument and guide the analysis of the internal environment, four additional guiding aspects were defined: people, infrastructure, services/products, and work processes.

To ensure a comprehensive perspective of the SAA, all general coordinators representing various SAA units participated in the environmental analysis. Information was systematically collected using spreadsheets and electronic forms. The responses were amalgamated into a consolidated document, and an analysis was conducted to identify the most frequently mentioned characteristics. Based on this analysis, the strengths, weaknesses, opportunities, and threats were summarized. In total, after the compilation facilitated by the process facilitation team, 15 strengths, 19 weaknesses, 15 opportunities, and 11 threats were identified.

**Figure 2**

*SWOT analysis excerpt*



**Source:** developed by authors (2022).

The third stage of the SP process entailed the definition of objectives, which serve as qualitative guidelines directing the focus and allocation of organizational resources to achieve its mission and vision (Albuquerque & Carrillo, 2010). To organize the objectives on a strategic map, the definition of strategic perspectives was essential. For SAA, strategic perspectives encapsulate the macro-aspects considered in the implementation of the organizational strategy.

Through a brainstorming process, three strategic perspectives were defined: people; internal processes; information and communication.

After establishing the strategic perspectives, the next step involved defining the strategic objectives. To ensure alignment between the SP of the Ministry of Health and that of the SAA, spreadsheets and electronic forms were created. These tools facilitated the proposal of strategic objectives linked to the objectives of the MH. Drawing from the information obtained in the environmental analysis and considering the MH SP, all SAA general coordination actively contributed to defining the organization's objectives.

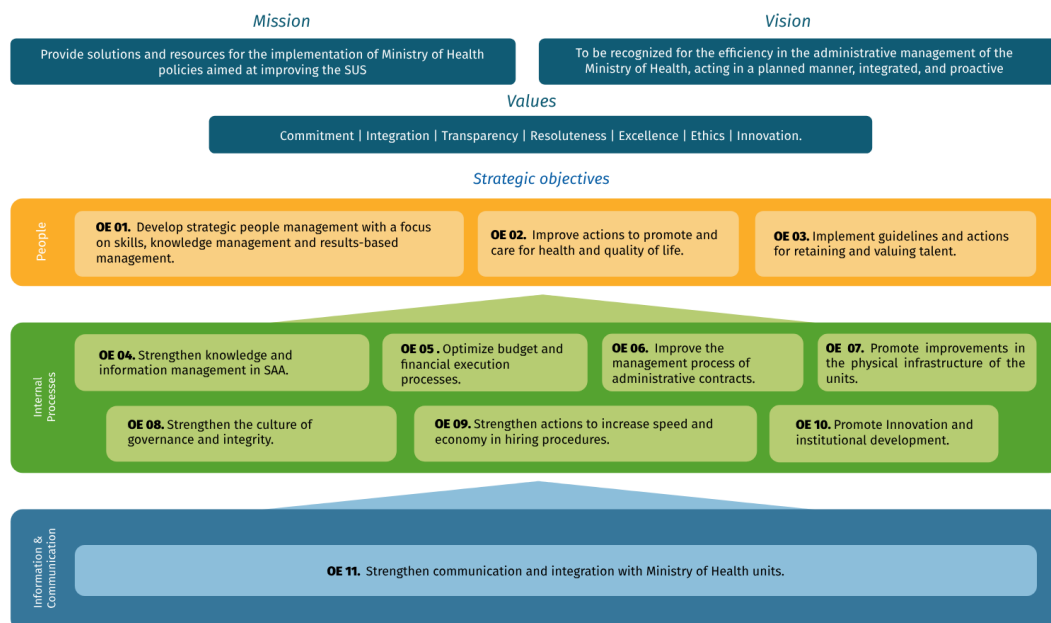
After completing the stage of proposing strategic objectives, all 42 suggestions (7 related to the people's perspective, 29 related to internal processes, and 6 related to information and communication) were consolidated. Subsequently, a grouping process commenced, categorizing the proposals both by perspectives and based on the affinity of the suggestions. Following analysis and grouping, a total of 11 proposals for strategic objectives emerged. These were then circulated back to the general coordination departments for a second round of proposals.

While all general coordination initially participated in formulating strategic objectives, in the second round, four out of the seven general coordination submitted new suggestions. At the conclusion of the entire process, a total of eleven strategic purposes were defined, garnering full validation from all SAA managers.

With the defined strategic objectives in hand, it became feasible to construct a strategic map for planning, wherein the objectives guide the realization of the institutional mission and vision. Figure 3 presents the structured strategic map for SAA.

Figure 3

SAA's Strategic map



Source: developed by authors (2022).

Upon approval, the strategic objectives were systematically linked to the respective general coordination departments. All general coordinators were consulted regarding the participation of the coordination under their responsibility in achieving the strategic objectives. Subsequently, it was determined which general coordination would be responsible for each objective.

With the strategic objectives defined and their links to general coordination established, the fourth stage of the planning process commenced—the definition of actions. Strategic actions are construed as the operationalization of objectives. Consequently, for each objective, a set of strategic actions is delineated. These actions, when implemented, contribute to the realization of the corresponding objectives (Albuquerque & Carrillo, 2010). To formulate strategic actions, two facilitators were assigned to assist each of SAA's general coordination. Proposals for these actions were gathered through electronic spreadsheets, linking them to strategic objectives and incorporating insights from the environmental analysis. Over the course of a month, meetings were conducted with the teams, encompassing at least two sessions per general coordination, where facilitators actively participated.

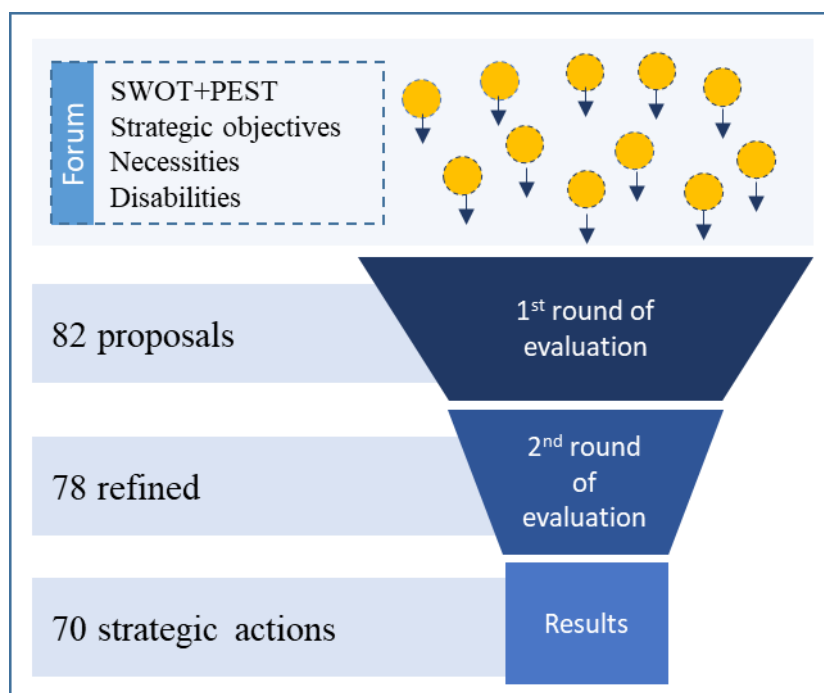
The collaborative process involved establishing links between strategic actions and objectives, carefully considering factors identified in the situational analysis, including strengths, weaknesses, threats, and opportunities. The development of strategic actions drew

upon the collective expertise of managers and addressed deficiencies and needs identified comprehensively across general coordination and SAA. This inclusive approach, accommodating diverse interests and perspectives, is crucial for constructing a holistic model for the sub secretariat (Hințea, 2008; Salkić, 2014; Ugboro et al., 2011).

At the outset, 82 proposals for strategic actions were crafted, aligning with the 11 strategic objectives outlined by SAA. Following a round of analysis, grouping, and validation, this set of propositions was refined to 78 proposed actions. Subsequently, in the second round of evaluation, the Strategic Forum meticulously filtered and validated these 78 proposed actions, resulting in a streamlined list of 70 strategic actions intricately linked to the 11 strategic objectives. The process of defining actions is succinctly illustrated in Figure 4.

**Figure 4**

*Process of developing strategic actions*



Source: developed by authors (2022).

Simultaneously with the formulation of strategic actions, the fifth stage of the planning process commenced—the development of indicators. Utilizing the same collection instrument for both activities, a strategic indicator was established for each of the strategic actions. These indicators serve the purpose of measuring the effectiveness and reach of the actions.

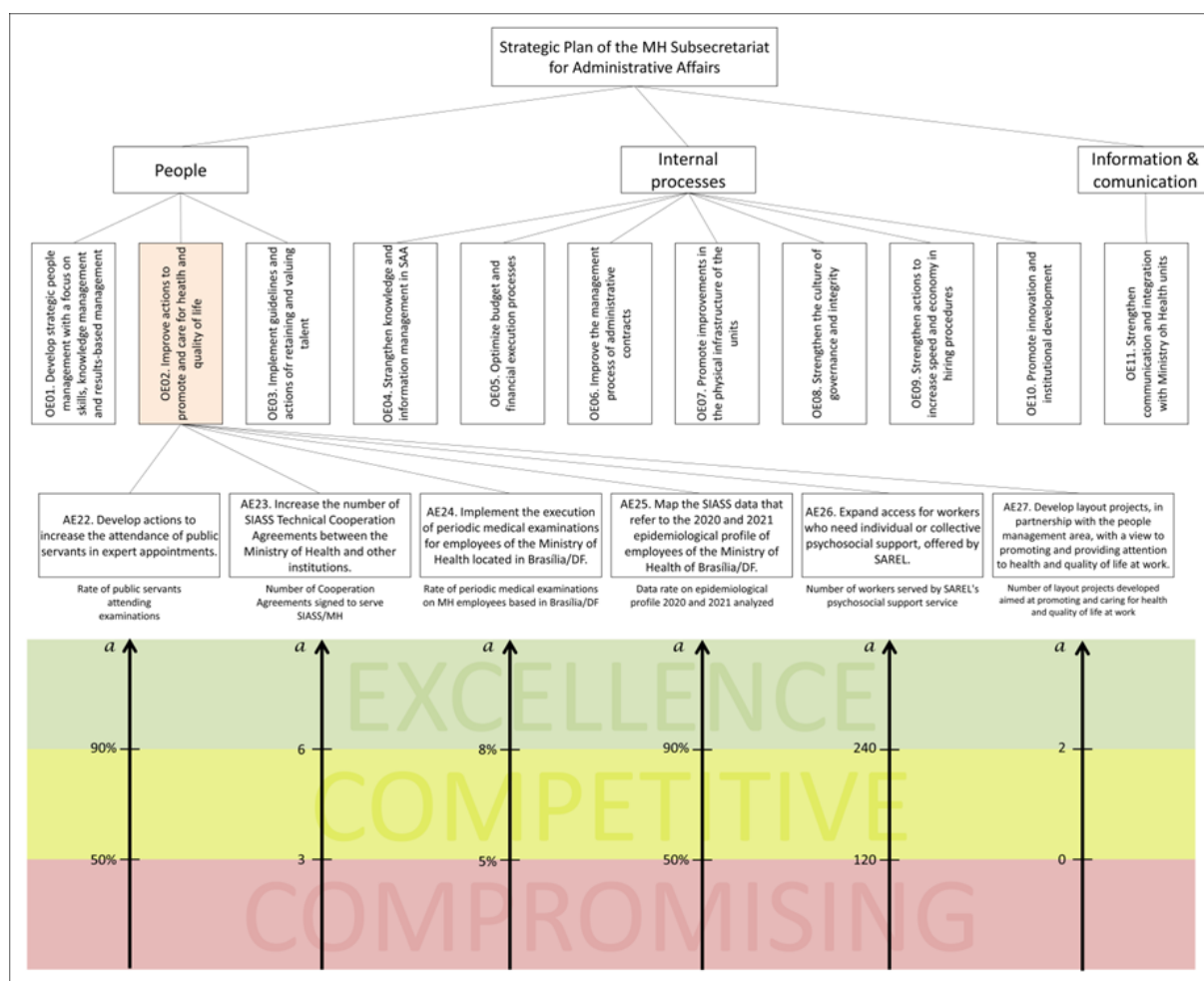
Similar to the approach taken for strategic actions, the formulation of indicators underwent thorough discussion, analysis, and validation by the general coordination. These

processes involved collaborative meetings between each coordination's team and facilitators. The logic employed in constructing the indicators aligned with the descriptors outlined in the multi-criteria decision aiding - constructivist (MCDA-C) (Ensslin et al., 2022; Longaray et al., 2015). This methodology aims to derive performance insights related to the contextual property associated with the value under monitoring and enhancement. Consequently, for each indicator, a foundational structure was defined, comprising a description detailing the specifics of the indicator. This included the preferred direction for the associated action, its calculation formula, and a measurement scale consisting of reference levels. These levels delineate the minimum expected performance in the action (neutral level) and the targeted goal for the action (good level) (Bana & Costa et al., 1999; Ensslin et al., 2020). The reference levels serve to categorize the scales into three distinct performance regions— compromising, competitive, and excellence—providing managers with a visual framework to assess indicator performance.

At the culmination of this stage, a comprehensive performance indicator was consolidated for each of the established strategic actions. Once more, the Strategic Forum assumed the responsibility of validating these constructed elements, which underwent deliberation and approval. A segment of the holistic model, emphasizing the second strategic objective and integrating the actions and indicators of general coordination into a unified system for SAA, is visually represented in Figure 5. This hierarchical structure empowers managers to discern focal points that, in their perception—bearing in mind that all elements were constructed from the Forum's perspective—merit attention and stand out in the sub secretariat's performance (Corrêa, 2007; Ensslin et al., 2022; Matos et al., 2019). This approach facilitates targeted management efforts directed toward the realization of established strategic objectives.

Figure 5

Indicator System for strategic actions – Highlight on strategic objective 02



Source: developed by authors (2022).

For the monitoring stage, the team of facilitators structured an instrument that allows identifying the elements contained in the developed SP - such as strategic objectives, strategic actions, indicators, and goals - and monitoring the evolution of the scope of the established strategies (Höglund et al., 2018). In this instrument, it is possible to fill in information regarding the results measured in the indicators, periodically, which are presented graphically later, showing the progress of performance by those responsible and by strategic objectives.

Monitoring and monitoring the performance of indicators allows managers to build knowledge about the aspects that have hindered the achievement of the institutional mission and vision and the aspects that stand out in the organizational unit (Alonso, 2010; Salazar & Cerda, 2018; Ugboro et al., 2011). This knowledge, then, can promote new informational needs, which result in the promotion of organizational strategic renewal, with the review of SP elements, in a cyclical and procedural way, aiming at continuous improvement and process 16



improvement (Matos & Ensslin, 2020), culminating in greater opportunities to strengthen institutional sustainability.

The preparation of the SAA SP is considered of fundamental importance for the advancement of the strategy in public management. By adopting a strategic approach, SAA can improve its efficiency, align its goals with the needs of the population and optimize its resources, thus culminating in the creation of value for society. The involvement of the entire team in the planning process not only allowed a sense of belonging to the process, but also brought several reflections on the reality of the organization. It should be noted that the SP brings a preventive approach, considering resource limitations and the complexity of the sector, and, as the name suggests, it is strategic to face specific challenges, ensuring an organized approach, based on empirical evidence and with clear objectives to better deliver value to society.

## 5 FINAL CONSIDERATIONS

In addressing the vital subject of planning within the public sector, this article endeavored to address the research problem: how to develop strategic planning in a public sector entity, considering the holistic perspective of an organizational unit? In response to this query, our objective was to construct a strategic planning model for the Ministry of Health's Sub secretariat of Administrative Affairs. The aim is to empower administrators to control and assess work processes and facilitate integrated management across its general coordination while ensuring alignment with the overarching planning framework established for the MH.

The model was developed by embracing the strategic planning cycle proposed by Matos et al. (2023). The proposal underwent validation by the unit's management team, ensuring alignment with their perspectives. Facilitators spearheaded the execution of the six steps outlined in the planning cycle, aligning with the aspects deemed necessary and pertinent as highlighted by the managerial forum. The initial steps encompassed defining the mission, vision, and values, followed by an analysis of the internal environment to identify strengths and weaknesses, and an examination of the external environment to pinpoint opportunities and threats.

Subsequently, the strategic planning model incorporated three perspectives, further segmented into eleven strategic objectives that serve as key priorities for the specified period. To facilitate both the realization and assessment of these objectives, seventy strategic actions were delineated, providing clear guidance on what needs to be executed to fulfill the objectives. Additionally, a performance indicator was assigned to each action, facilitating the measurement

of goal attainment. To round out the structure of SAA's strategic planning, a monitoring framework was meticulously defined. The entire process unfolded collaboratively, with active engagement from all general coordination within SAA.

Implementing strategic planning at SAA/SE/MH contributes concretely to the realworld application of conceptual frameworks and definitions provided by various authors. It aids in establishing guiding principles and prioritizing strategic actions within the sub-secretariat's scope, a matter of utmost importance given its national-level impact. The environmental analysis not only facilitates leveraging strengths but also brings weaknesses to the forefront, enabling preventive actions within the sub secretariat.

The definition of clear objectives allows the manager to execute the SP more assertively and directs the decision-making process. Control and monitoring, through indicators, allow adjustments to be made, when necessary, even during the course of implementing the plan. From the execution of the SP and its follow-up and monitoring, SAA creates an organizational culture of planning focused on results and good practices towards a spiral of excellence, helping to promote organizational sustainability. It is also worth mentioning that this article describes the execution of the SP cycle proposal defined by Matos et al. (2023), empirically demonstrating its processes.

In contributing to the theoretical landscape of planning in public management, this study provides essential insights for strategic development, outlining key elements crucial for its construction process. The research demonstrates the implementation of fundamental steps, as emphasized by studies like Hinc̃ea (2008), which underscores specific characteristics of the public sector that are often overlooked. Through this, the study addresses gaps and enhances the applicability of strategic planning in public organizations, fostering effectiveness, responsibility, and transparency at all organizational levels.

The development of the SP model not only facilitates effective management for SAA but also provides valuable insights into the broader application of SP in public organizations. In terms of enhancing SAA management effectiveness, the SP model establishes a robust framework for goal setting, objective definition, identification of areas for improvement, and allocation of resources. This model enables the sub secretariat to align its activities and resources with strategic priorities, optimizing organizational performance and efficiency.

Likewise, the SP model offers a systematic approach to analyzing both the external and internal environment. This analytical process enables the sub secretariat to identify potential threats, opportunities, and internal resources crucial for its success. By considering these

factors, SAA can make more informed and proactive decisions, anticipating changes and evolving in response to the demands of its operating context.

The current study holds significance in the realm of public management, particularly in the context of developing Strategic Planning within the Sub secretariat of Administrative Affairs of the Ministry of Health. Within this framework, the study imparts valuable lessons and recommends best practices, drawing from the insights gained throughout the process. This study is characterized by its participatory approach, strategically aligned with the objectives of the MH. It includes a thorough analysis of the environment within which the Sub secretariat of Administrative Affairs operates, places emphasis on performance measurement, and upholds a commitment to transparency throughout all phases of the process. These distinctive characteristics not only contribute significantly to the advancement of knowledge in the field of public management strategy but also serve as an exemplary and potentially replicable process for other government organizations.

In conclusion, it is essential to recognize that the model's construction is grounded in the perspectives of individuals engaged in the SAA management process and is tailored to align with the Ministry of Health's planning. Consequently, the outcomes derived from this construction are specific and should not be universally generalized to all public organizations (Tsang, 2014). Nevertheless, it is noteworthy that the processes and steps elucidated in this study possess the potential for adaptation and adoption by other government organizations aspiring to achieve more efficient, transparent, and strategic management.

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