



Tomorrow's Doctors, Tomorrow's Cures®

Operationalizing Your Strategic Plan: Part II

Sponsored by the Group on Institutional Planning (GIP) Subcommittee on Strategic Planning and Management

Learn

Serve

Lead

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Association of
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Disclosures

Elaine Van der Put, PhD, MPH and Sheela Dominguez, MBA are partners in *VanDom Consulting, LLC*, a consulting company specialized in the assessment of business opportunities and the development of growth strategies for a wide variety of enterprises.

Poll Question

Please share your personal experience participating in strategic plan implementations. Were they:

- A. Extremely successful
- B. Somewhat successful
- C. Somewhat unsuccessful
- D. Extremely unsuccessful

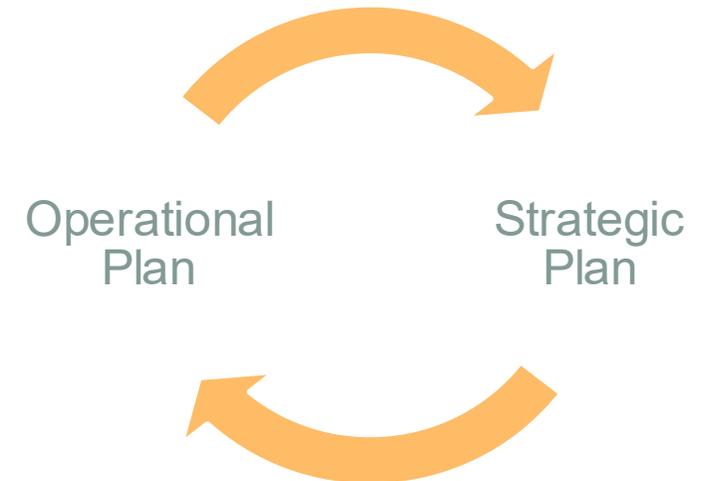
Agenda

1. Operational vs. Strategic Plans
2. Strategies to ensure successful implementation
3. Implementation Processes and Tools
4. Aligning Strategic Plan Implementation with Budgets

1. Operational vs. Strategic Plans

- Short-term vs. Long-term
- Unit/Department vs. Organization
- Rigid vs. Adaptable
- Strategic Initiatives vs. Strategic Goals

Organizations need **BOTH** types of plans to succeed, and ideally, they exist in a feedback loop



Operational Plan

- Executed at Department or unit level
- Details the daily, weekly, monthly, and quarterly work that has to be done to achieve strategic goals
- Establishes the department's priorities
- Short-term, often one year or less
- Ties to an annual operating budget
- Managers and staff are accountable

Strategic Plan

- Organization-wide plan that involves leaders and stakeholders across functions and units
- Includes mission, vision and overarching goals, and how to measure progress
- Long-term, often 5 to 10 years or more
- Responds to the external environment
- Aligns programs and projects so that they move in the same direction, towards the overarching goals
- Leaders are accountable

Pitfalls

Unclear and undefined strategic and operational plans – or confusing an operational plan for a strategic one

How to tell if it's an operational plan:

- Is not adaptable to changes in external factors (e.g., legal, social, political)
 - For example: An operational plan doesn't provide guidance on what to do if my institution can't hire post-doctoral fellows from China anymore
- Includes details at a departmental, unit and individual level
- Is tied to the annual operating budget
- Is shorter-term

Aligning Operational and Strategic Plans



Aligning Operational and Strategic Plans

Annual Operational Plan Components:

Routine Operational Activities

Short-term Strategic Initiatives described in the strategic plan

Scope and Outcomes (What)

Impact and Value (Why)

Schedule and Timing (When)

Strategic Initiative Team and Stakeholders (Who)

Budget (How much)

Any questions before moving to the next section?

Agenda

1. Operational vs. Strategic Plans
- 2. Strategies to ensure successful implementation**
3. Implementation Processes and Tools
4. Aligning Strategic Plan Implementation with Budgets

Strategies to ensure buy-in and successful implementation

1. Must be trumpeted from the Top (President, Dean, etc.)
2. Must be baked into the design of the strategic planning process
3. Must have champions threaded throughout the institution
4. Must have someone who wakes up thinking about it
5. Must be a central driver in decision making
6. Must include a periodic communication loop that highlights annual outcomes, etc.

Strategies to ensure buy-in

1. Must be trumpeted from the Top

Morehouse School of Medicine Strategic Plan

Strategic Structure...Each Statement Lays the Foundation for the Next



* Mission = Our Core Purpose

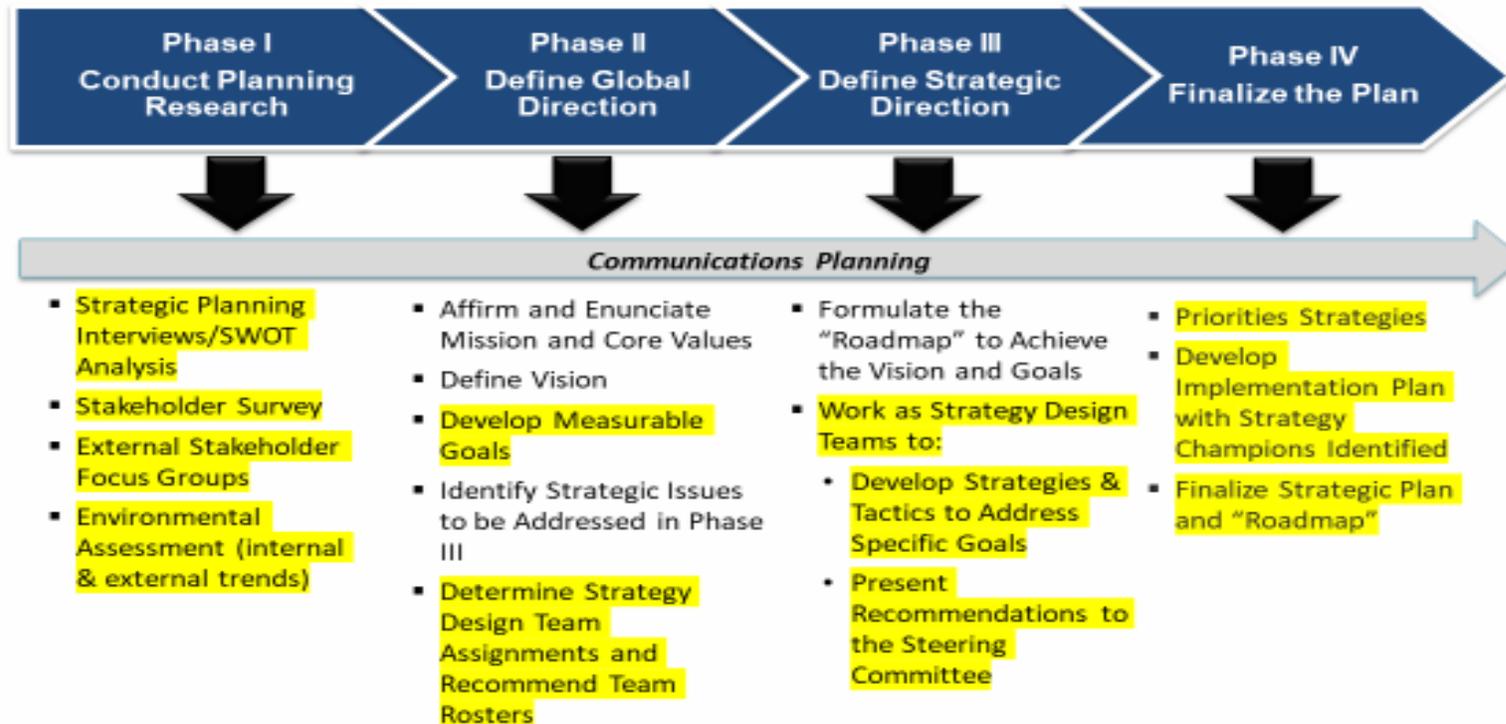
** Core Values = Principles that Guide Organizational Behavior

Strategies to ensure buy-in

2. Must be baked into the design

Morehouse School of Medicine Strategic Plan

The Strategic Planning Process



Strategies to ensure buy-in

Morehouse SOM: Strategic Planning Kick-Off Meeting

Phase I Analytical Activities

Qualitative Assessment

Activity 1 →

50 Internal Interviews

- Senior Leadership
- Faculty
- Staff
- Students and Trainees

Activity 2* →

External Stakeholder Focus Groups

- Current strengths/weaknesses of the SOM
- Issues to be addressed in the plan
- Greatest opportunities for the future

Activity 3 →

Stakeholder Survey (Follows completion of Activity 1)

- Validate strategic priorities from Activity 1
- Solicit institution-wide input on core values and strategic issues

Quantitative Assessment

Activity 4* →

Environmental Assessment

- Clinical Services
- Education
- Research
- Resources

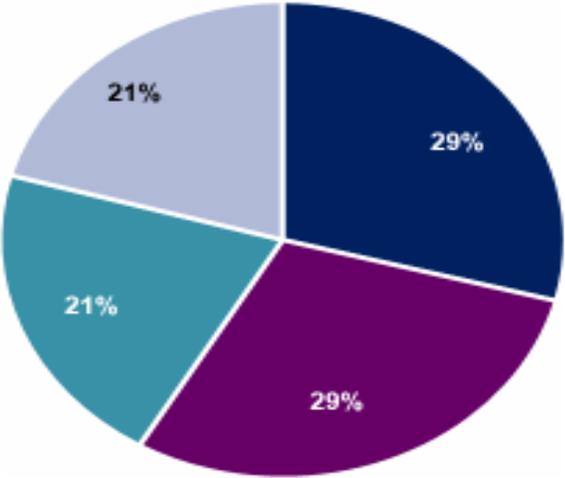
**To be completed by in-house Morehouse team with guidance from AMC Strategies*

Strategies to ensure buy-in

Morehouse School of Medicine Strategic Plan – Resource Requirements

FIVE-YEAR SUMMARY: By Vision Imperative

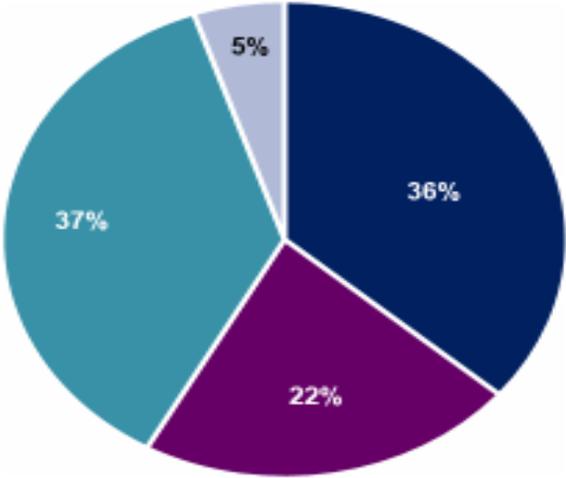
Five-Year Operating Cost Estimate



Total = \$59.7M

Five-Year Capital / Start-Up Cost Estimate

- Translating Discoveries into Health Equity
- Building Bridges between Healthcare and Health
- Preparing Future Health Learners and Leaders
- Cross-cutting Strategies



Total = \$10M

Strategies to ensure buy-in

3. Must have champions threaded throughout the institution

Morehouse School of Medicine Strategic Planning Initiative	
Top Priority Strategies and Champions	
TRANSLATING DISCOVERY INTO HEALTH EQUITY STRATEGIES	STRATEGY CHAMPION(S)
1.1 Assess the MSM research portfolio as well as the national landscape to identify projects that "move the needle" on improving health; further build relevant projects with proven outcomes.	• G. Floyd ; R. Gonzalez, G. Newman
4.1: Build a biomedical data repository for sharing data across the School of Medicine and beyond.	• A. Quarshie ; R. Sridaran, C. Mack-Andrews
4.3. Leverage big data to become the premier scholarly center for the integration of primary care, community health, health equity research and health implementation science (T*).	• P. MacLeish ; N. Emmett, G. Rust
BUILDING BRIDGES BETWEEN HEALTHCARE AND HEALTH STRATEGIES	STRATEGY CHAMPION(S)
1.1: Lead innovation in population health management by developing programs that meet the needs of targeted populations and leverage the unique strengths of MSM.	• G. Rust ; H. Strothers; M. Nichols; R. Braithwaite; Y. Tyler-Hill
2.1: Produce and disseminate scholarly work that is the gold standard for defining and achieving health equity.	• D. Mack ; E. Ofili; K. Holden; J. Hopkins
4.2: Market and promote healthcare and health opportunities provided by MSM, MHC and other clinical affiliates to become known in the community for outstanding service, health education and specialized care.	• R. Nu'man ; B. Harris; P. Simmons; D. Hefner
PREPARING FUTURE HEALTH LEARNERS AND LEADERS STRATEGIES	STRATEGY CHAMPION(S)
1.1: Elevate existing MSM pipeline activities and develop new initiatives to increase the quality and availability of pipeline programs.	• C. Brooks
2.1: Expand philanthropic support for student scholarships.	• G. D. Thompson
3.1 Recruit, retain and develop high-quality faculty and staff committed to educating and mentoring future scientists, healthcare providers, and public health professionals	• W. Thompson ; Erika Brown; Peter MacLeish; Herman Taylor
CROSS-CUTTING STRATEGIES	STRATEGY CHAMPION(S)
D.1: Build a diverse and sustainable financial platform.	• J. Case ; D. Hefner; D. Beech; A. Vaughn
D.2: Enhance fundraising capacity, increase donor engagement and create a culture of giving.	• B. Harris ; S. Harris-Hooker; Dr. Satcher; D. Mack
E.1: Launch a comprehensive, coordinated branding, marketing and public relations campaign for MSM and Morehouse Healthcare.	• P. Simmons ; C. Franklin; R. Gooden

Strategies to ensure buy-in

4. Must have someone who wakes up thinking about it
(preferably on the cabinet or reporting to the dean)

1. Vice President
2. Chief of Staff or Special Assistant*
3. Someone in the Dean's Office

(NOTE: It's important that the person assigned to implement, monitor, and track the outcomes of the strategic plan has adequate time and staff to do so. If done right, this is a full-time job.)

Strategies to ensure buy-in

5. Must be a central driver for decision making

My president/dean makes it clear:

“If what you’re doing is not aligned to our strategic plan, then you should not be doing it.”

Strategies to ensure buy-in

6. Must include a periodic communication loop that highlights annual outcomes, etc.

Morehouse SOM: Strategic Planning Kick-Off Meeting

Strategic Plan Communications: Keys to a Successful Process & Outcome

What / When to Communicate:

At Process Launch and/or During Process:

- Strategic Planning Steering Committee Membership & Leadership's Charge to the Group
- Listing of Individuals on Teams; Interviewees; Others involved
- Strategic Planning Process Schedule/Time Line
- Highlights & Updates (e.g., Environmental Assessment; Interviews Summary; plan development)

At Plan Completion/Implementation Launch:

- Final Outcome of Strategic Planning Process
- Institution's Mission & Vision Statement
- Institution's Values, Goals, & Strategies
- Strategic Plan Implementation Approach, Accountabilities, Timelines (varies by audience)
- Regular Updates on Progress

Communication Vehicles

- Online (Website)
- Electronic Communication (email)
- Strategic Planning Steering Committee Meetings / Implementation Updates
- Design Team Meetings / Strategic Initiative Team Meetings
- Departmental Meetings
- Organizational Retreats
- Faculty/Staff/Student Meetings
- Town Hall Meetings / Updates
- Community Forums
- Newsletters/Announcements
- Publications/Postings

Questions or Clarifications?

Agenda

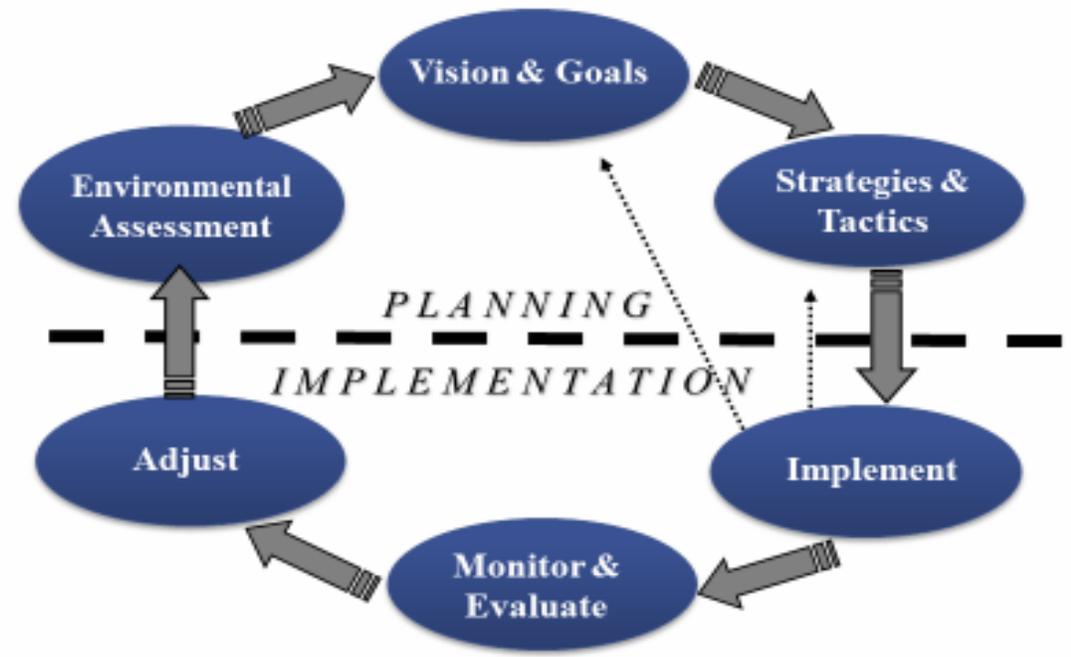
1. Operational vs. Strategic Plans
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Developing the Implementation plan, process, outcomes

Morehouse SOM: Strategic Planning Kick-Off Meeting

Phase IV: Implementation and Tracking Mechanisms are Key Outcomes

...Planning is an on-going, continuous process



- Successful execution is key
- Balance between strategic & operational pressures must be maintained
- Goals and strategies in the original strategic plan should be periodically assessed and adjusted to meet changing market conditions – to make the Plan a “living document”

Developing the implementation plan, process, outcomes

Morehouse School of Medicine Strategic Plan

I. Translating Discovery into Health Equity

GOALS	STRATEGIES	TARGET METRICS
Goal 1: Provide evidence that MSM discoveries improve health through relevance and proven outcomes – implementation science (T ^x ™).	1.1: Assess the MSM research portfolio as well as the national landscape to identify projects that “move the needle” on improving health; further build relevant projects with proven outcomes.	<ul style="list-style-type: none"> • Increase # of surveys and interviews completed to assess the research portfolio • Increase # of papers accepted • Increase # of positive ACO and patient outcomes
	1.4: Strategically position MSM as the creator and leader of T ^x ™.	<ul style="list-style-type: none"> • Increase in # of papers accepted • Increase # of collaborative grants awards • Increase in # of Marketing Materials
Goal 2: Leverage and develop novel technologies and mechanisms to better inform decisions affecting health.	2.1: Deploy technology-based interventions to improve health and promote health equity.	<ul style="list-style-type: none"> • Increase of # of new projects using smartphone applications and social media usage • Increase # of new partnerships in the tech space • Increase % of funding
Goal 3: Commercialize and disseminate MSM discoveries to advance health equity across the nation and around the world.	3.1: Establish the MSM Innovation Center to support development of innovative discoveries through commercialization.	<ul style="list-style-type: none"> • Increase # of MSM discoveries contributing to at better inform health • Increase # of commercialized products and patents • Increase # of new partnerships in the tech space • Increase % of funding
Goal 4: Generate and analyze big data to create solutions that lead to health equity.	4.1: Build a biomedical data repository for sharing data across the School of Medicine and beyond.	<ul style="list-style-type: none"> • Increase # of scholarly activities tied to Big Data for faculty and staff • Increase # of big data training (Courses, seminars etc) integrated into MSM Training Programs and faculty development programs. • Increase # of big data research related Pilot awards awarded • Increase # of advanced bio-computing tools acquired • Increase # of Big data research related projects supported • Increase # of research initiatives that contribute to institutional clinical research data warehouse • Increase # of research initiatives that utilize institutional clinical research data warehouse
	4.3. Leverage big data to become the premier scholarly center for the integration of primary care, community health, health equity research and health implementation science (T ^x ™).	<ul style="list-style-type: none"> • Increase # of MD and GEBS students obtaining credited, practical research experience in BD-DS in biomedical education, health care, community health, and health equity research. • Increase # of demonstrated student proficiency of big data. • Increase % of improved success rates in grants awarded

Developing the implementation plan, process, outcomes

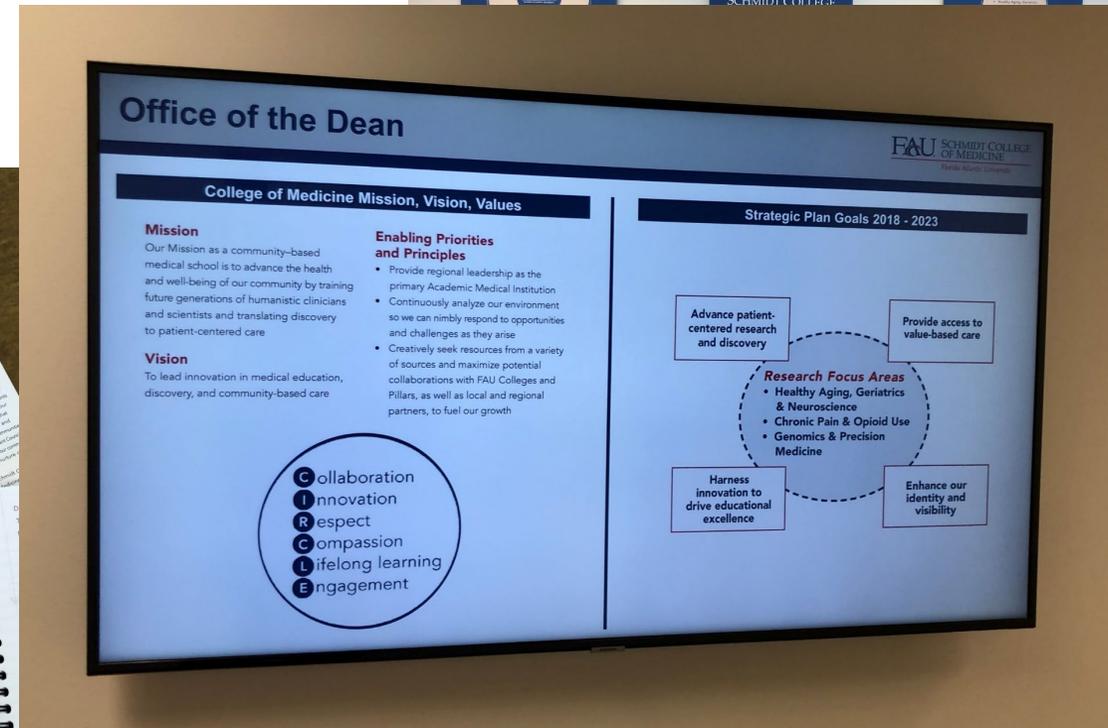
FY19 Strategic Plan Scorecard Top Priority Strategies*



Complete	In Progress - On Track	In Progress - Monitor	In Progress - Concern	Vision Imperative 1: Translating Discovery into Health Equity			
Goal	Strategy	FY16 Progress	FY17 Progress	FY18 Progress	FY19 Progress	Tactical FY19 Progress (Selected Items)	
Goal 1: Provide evidence that MSM discovers improve health through relevance and proven outcomes - implementation science (Tx™)	1.1 Assess the MSM research portfolio as well as the national landscape to identify projects that "move the needle" on improving health; further build relevant projects with proven outcomes.	●	●	●	●	<ul style="list-style-type: none"> - Concluded first Tx survey of MSM faculty research portfolio - Launching Phase II of MSM's research assessment - Awarded three Tx Pilot studies - Hired post-doc to survey national landscape 	
Goal 4: Generate and analyze big data to create solutions that lead to health equity.	4.1 Build a biomedical data repository for sharing data across the School of Medicine and beyond. 4.3 Leverage big data to become the premier scholarly center for the integration of primary care, community health, health equity research and health implementation science (Tx™).	●	●	●	●	<ul style="list-style-type: none"> - Implemented EPIC Social Determinants of Health Module - Launched All of Us - NIH National Precision Medicine Project - Hired OI Institutional Research Director - Launched Data Science Institute among ALC Consortium - Grew NCPIC secondary data research division - Training students to develop population health projects using data 	
Vision Imperative 2: Building Bridges Between Healthcare and Health Strategies							
Goal	Strategy	FY16 Progress	FY17 Progress	FY18 Progress	FY19 Progress	Tactical FY19 Progress (Selected Items)	
Goal 1: Create and disseminate transformational models of care for vulnerable populations.	1.1 Lead innovation in population health management by developing programs that meet the needs of targeted populations and leverage the unique strengths of MSM.	●	●	●	●	<ul style="list-style-type: none"> - Developed integrative medicine clinic for adults for chronic disease management by use of plant-based, oil-free diets for obesity reduction in vulnerable youth - Launched MSM Telehealth Initiative and invested in adequate clinical and administrative staff - Launched Project UPLIFT intervention with epilepsy patients 	
Goal 2: Demonstrate the value of achieving health equity as a national and international priority.	2.1 Produce and disseminate scholarly work that is the gold standard for designing and achieving health equity.	●	●	●	●	<ul style="list-style-type: none"> - MPH graduates submitted health equity article after graduation - MPH faculty submitted health equity peer-reviewed papers - Published seminal Tx article in the journal of Ethnicity & Disease - Presented Phase II findings of National Product Research Center 	
Goal 4: Operate the MSM clinical enterprise as a model to showcase best practices in achieving health equity.	4.2 Market and promote healthcare and health opportunities provided by MSM, MHC and other clinical affiliates to become known in the community for outstanding service, health education and specialized care.	●	●	●	●	<ul style="list-style-type: none"> - Migrated the practice-wide electronic medical record from Practice Partner to Epic - Community Connect Model and Optimize EPIC - Continuing to execute MHC marketing and PR campaign to showcase MHC's scope of services, locations, and clinical expertise - Launching MSM magazine to expand brand awareness of MSM's fulfillment of its vision of health equity 	
Vision Imperative 3: Preparing Future Health Learners and Leaders							
Goal	Strategy	FY16 Progress	FY17 Progress	FY18 Progress	FY19 Progress	Tactical FY19 Progress (Selected Items)	
Goal 1: Develop innovative approaches to diversify the pipeline for health and science careers.	1.1 Elevate existing MSM pipeline activities and develop new initiatives to increase the quality and availability of pipeline programs.	●	●	●	●	<ul style="list-style-type: none"> - Published chapter on MSM-TAG initiative in "Investing in America's Workforce," a national publication of the Federal Reserve Bank - Launched new Entrepreneurial program at TAG with external funding - Secured multi-million dollar grant for H-COP program 	
Goal 2: Establish an individual endowment for every MSM student.	2.1 Expand philanthropic support for student scholarships.	●	●	●	●	<ul style="list-style-type: none"> - Increased average percent of student tuition, fees funded by scholarship endowment - Secured scholarship funding from Coca-Cola Foundation for student scholarships - Leveraged state investment for 5 MD student scholarships over four years 	
Goal 3: Broaden diversity in the healthcare, scientific and public health workforces.	3.1 Recruit, retain and develop high-quality faculty and staff committed to educating and mentoring future scientists, healthcare providers, and public health professionals.	●	●	●	●	<ul style="list-style-type: none"> - Declared Recruitment and Retention of faculty and staff as one of four priority areas for employee engagement improvement, will submit, launch action plan in FY20 to address recruitment and retention - Implementing New Hire Export and Position Description in Banner to streamline the recruitment process 	
Cross-Cutting Goals							
Goal	Strategy	FY16 Progress	FY17 Progress	FY18 Progress	FY19 Progress	Tactical FY19 Progress (Selected Items)	
D. Resources & Philanthropy: Secure sustainable resources.	D.1 Build a diverse and sustainable financial platform.	●	●	●	●	<ul style="list-style-type: none"> - Recruited new Senior Associate Dean for Clinical Affairs (SADCA) - Realignment of organizational structure: realigned structure in Grants and Contracts, and Budget Office - Launched Tier 1 Phase of \$150 million Comprehensive Campaign - Launched staff training on financial policies, procedures, technology requirements 	
	D.2 Enhance fundraising capacity, increase donor engagement and create a culture of giving.	●	●	●	●	<ul style="list-style-type: none"> - Created Planned Giving Society - Recruited new professionals, including campaign manager, campaign writer, and alumni giving officer, to Institutional Advancement staff - Grew alumni giving to Top 10 level among AAMC institutions - Developed the framework, including chairpeople, for Comprehensive Campaign 	
E. Branding & Marketing: Create a strong and distinctive MSM brand identity.	E.1 Launch a comprehensive, coordinated branding, marketing and public relations campaign for MSM and Morehouse Healthcare.	●	●	●	●	<ul style="list-style-type: none"> - Continuing to execute Morehouse Healthcare marketing and public relations campaign, including WABE radio promos - Through PR efforts, secured several print and TV articles and reports on MSM and MHC faculty, staff and learners, including at least two national reports in national TV networks; Published 2018 Annual Report 	

Communicate, Communicate, Communicate ...

It helps a lot to have visually appealing summary items



about FAU
- new leaders could do
- Admin. Whitepaper
C) Branding of off letters
can keep it raise me

Any questions before moving to the last section?

Agenda

1. Operational vs. Strategic Plans
2. Strategies to ensure successful implementation
3. Implementation Processes and Tools
4. **Aligning Strategic Plan Implementation with Budgets**

4. Aligning Strategic Plan Implementation with Budgets

Usually Strategic Plans:

- Span 5-10 years

- Define **short and long term** strategic goals

- Determines **sequence** of goal implementation

Short-term Goals inform → Short-term (annual) Operational Plan
which will inform → the annual operating budget

Operational Plan drives the Annual Budget

Annual Operational Plan/Budget Components:

- Routine Operational Activities
- Short-term Strategic Initiatives described in the strategic plan
 - Scope and Outcomes (What)
 - Impact and Value (Why)
 - Schedule and Timing (When)
 - Strategic Initiative Team and Stakeholders (Who)
 - Budget (How much)**

FAU Medicine 2018-2011 Strategic Initiatives

IMPROVE HEALTH BY LEADING INNOVATION

Mission

Our Mission as a community-based medical school is to advance the health and well-being of our community by training future generations of humanistic clinicians and scientists and translating discovery to patient-centered care

Vision

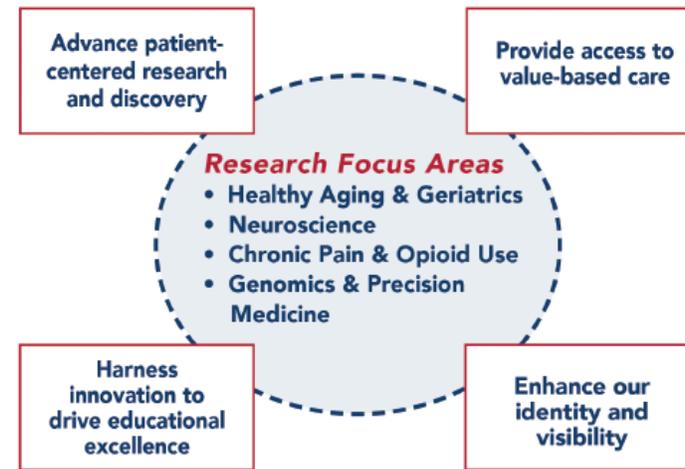
To lead innovation in medical education, discovery, and community-based care

Values

Collaboration – Innovation – Respect – Compassion – Lifelong learning – Engagement

Enabling Priorities and Principles

- Provide regional leadership as the primary Academic Medical Institution
- Continuously analyze our environment so we can nimbly respond to opportunities and challenges as they arise
- Creatively seek resources from a variety of sources and maximize potential collaborations with FAU Colleges and Pillars, as well as local and regional partners, to fuel our growth



STRATEGIC GOALS & SIGNATURE INITIATIVES

Goal 1:

Advance patient-centered research and discovery

- Invest in our research infrastructure through upgrades and development of research cores
- Develop a research culture to drive the research mission
- Foster team science and multi-disciplinary approaches to advance research focus areas by creating research teams and leveraging FAU practice plan to address real-world research questions
- Partner with key stakeholders by maximizing existing collaborations and identifying new partnerships in genomics, drug design and implementation science
- Provide enhanced research opportunities, mentorship, and resources for students and residents

Goal 2:

Provide access to value-based care

- Launch FAU Medicine practice plan to improve access to value based primary care in Palm Beach County and beyond
- Establish additional practice opportunities for clinical faculty not participating in FAU Medicine clinical practice
- Work closely with other FAU Colleges to determine potential interprofessional collaborations in practice plan
- Provide students and residents with innovative clinical learning opportunities in value-based care and support the pipeline for future physicians
- Recruit academically-oriented clinical faculty who can also support clinical research activities as anchors for the practice plan

Goal 3:

Harness innovation to drive educational excellence

- Build on the strength of our undergraduate medical education program: keep our humanistic and individualized approach while innovating with new high-touch, high-tech initiatives
- Attract top caliber undergraduate students through merit-based scholarships and other recruitment strategies
- Explore opportunities for new residency programs, including Ob/Gyn & Pediatrics, with appropriate partners in our evolving medical community
- Reconfigure departmental structure to reflect the growth and maturation of the College of Medicine
- Leverage opportunities with FAU Colleges, Pillars and Community Partners to maximize potential collaborations

Goal 4:

Enhance our identity and visibility

- Invest in the diversity, professional growth, and development opportunities for our people: faculty, staff, students, and residents
- Foster a culture of wellness across our entire organization in recognition that our well-being affects the health and well-being of our patients and communities
- Establish a Community Engagement Council to represent the diverse needs of our community
- Engage, recognize, and nurture our affiliate faculty
- Build our Charles E Schmidt College of Medicine and FAU Medicine brands by developing a marketing and communications strategy supported by a sustained budget
- Promote the “value added” aspect of a College of Medicine and how we contribute to the overall FAU strategic plan and to hospital partners

Goal 1: Strategic Initiative Name



Strategic Initiative ELT Owner	
Project Manager	

Scope and Outcomes (What)

Initiative Scope

Describe the major components of the strategic initiative. Components are the visible/tangible changes to program, process, organization, or infrastructure that result from the effort.

Scope Components / Work Breakdown Structure

Description	Component	Owner / Lead
Component 1		
Component 2		
Component 3		

Impact / Value (Why)

Programmatic Outcomes. Identify up to three projected programmatic outcomes of the initiative for the coming fiscal/academic year. Program outcomes are measured as changes in participation, program satisfaction, infrastructure quality/availability, process/service excellence.

Outcome	Metric	Target (Estimate)
Outcome 1		
Outcome 2		
Outcome 3		

Goal Outcomes. Identify up to three specific goal-related metrics which could be impacted by the change achieved by the initiative.

Outcome	Metric	Target (Estimate)
Goal Measure 1		
Goal Measure 2		
Goal Measure 3		

Schedule and Timing (When)

Primary Project Phases

Phase	Duration	Anticipated Start Date
Phase 1		
Phase 2		
Phase 3		

Anticipated Milestones

Milestone	Type	Anticipated Date
Goal Measure 1		
Goal Measure 2		
Goal Measure 3		

Initiative Team and Stakeholders (Who)

Initiative Team

Role	Name	Title	Responsibilities	FTE

Primary Stakeholders

Stakeholder	Interest	Influence	Liaison

Budget (How Much)

Identify financial resources other than the personnel listed above to support the Strategic initiative in next fiscal/academic year.

Outcome	Description	\$ (000)
Outcome 1		
Outcome 2		
Outcome 3		
	Total Budget for strategic Initiative	

Assumptions / Risks / Constraints

Authorization

This authorization is to proceed with mobilization of the project per the budget presented above.

Executive Owner

Project Manager

Dean

Strategic Goal 1 - Strategic Initiatives Dashboard

Initiative Name	Executive Owner / Project Manager	Current Start / Current End Dates	Initiative Stage	Scope / Metric	Time / Metric	Budget / Metric	Next Milestone / Date	Critical Decisions / Authorizations
Initiative 1	John Smith Barbara Walters	7/1/2018 6/30/2020	Mobilize	●	●	●	1/31/2020	Donor Strategy
Initiative 2	Joanna Trent Darryl Brown	7/1/2019 3/30/2020	Sign lease agreement	●	●	●	1/31/2020	Finalize negotiations

4. Aligning Operational and Strategic Plans

Pitfalls:

Budget Constraints – Lack of resources to support strategic initiatives as compared to routine operational activities

Opportunistic Brilliant Opportunities

Alignment of top leaders (“my mission” vs “our mission”)

Stale or “In the Drawer” Strategic Plans

Resistance to Change

Budget exercise replacing Operational Plan

Budget informing operational plan and not vice versa

Questions ?

Upcoming GIP Events

Registration now open:

GIP/GBA 2020 Joint Spring Meeting

Hilton San Francisco Union Square

April 21-24, 2020

GIP/GBA 2021 Joint Spring Meeting

Fairmont Hotel Vancouver

April 27-30, 2021

For more information about these events or the Group on Institutional Planning (GIP), please contact Shawn Rosen-Holtzman at srosenholtzman@aamc.org.