



DEVELOPING, IMPLEMENTING AND MONITORING YOUR STRATEGIC PLAN

Carolyn Brayko - University of Nevada, Reno
Janice Renfro - Washington University in St. Louis
Katy Stevenson - University of Rochester Medical Center



Learning Objectives

- Articulate the three major components of a strategic planning process in academic medicine.
- Identify essential skill sets that strategic planners must master to manage a successful planning process.
- Understand how and when to implement various tools into individual schools' planning processes.

Strategic Planning Cycle

Taking the Principles of Strategic Planning and Making them Work for You



Assessment:
WHERE ARE WE
TODAY?



Formulation:
WHERE DO WE
WANT TO BE?



Implementation:
HOW DO WE
GET THERE?



You as the planner...

Facilitator: Summarize, Iterate, Progress, Summarize, Iterate, Progress

Operator: Seamlessly execute the details

Communicator: Level the playing field by providing information

Coach: Push participants to set a few achievable priorities



Where are we today?

ENVIRONMENTAL ASSESSMENT

An environmental assessment evaluates the organization's/service's current position through:

- data acquisition and analysis,
- focus groups,
- surveys,
- stakeholder interviews, and
- benchmarking



Pro tips!

Think about the questions!

Develop an environmental assessment using both qualitative and quantitative data.



Where are we today?

ENVIRONMENTAL ASSESSMENT

Quantitative Assessment- Start with the facts!

Assessment	
External	Internal
Market Area & Demographic Trends	Patient Volumes
Research Funding Trends	Payor Mix
Competitors	Research portfolio & funding
Pharmaceutical & Technological Trends	Medical Staff Profile
Market Payor Mix	Resident Matching
Economic Development of Market	Quality & Satisfaction Metrics
Consumer Preference Studies	Financial performance
Changes in Regulations, etc.	Facilities and Technology



Where are we today?

ENVIRONMENTAL ASSESSMENT

Quantitative Assessment- Benchmarking

Institution	Discharges	Size (Clinical Faculty)	LOS Index	Mortality Index	Readmissions 30 Day Related	Readmissions 30 Day All Cause	Cost Index	NIH (Rank)	NIH Funding	US News Rank
A	7,009	59	0.88	0.55	2.93	5.39	0.82	N/A	N/A	2
B	5,210	80	0.88	0.92	3.04	5.43	0.88	13	\$1.6M	7
C	4,685	55	1.07	0.95	3.56	6.7	1.11	25	\$687K	4
D	4,644	43	0.87	0.74	3.95	7.58	1.12	2	\$4.6M	19
E	4,370	77	1.02	1.12	4.17	7.22	0.99	N/A	N/A	3

Pro tip!

Data source examples include AAMC, Vizient, SG2, US News & World Report, Blue Ridge, Societies, Associations, Governmental Agencies (Federal, State & Local) & Websites.



Where are we today?

ENVIRONMENTAL ASSESSMENT

Qualitative Assessment Tools:

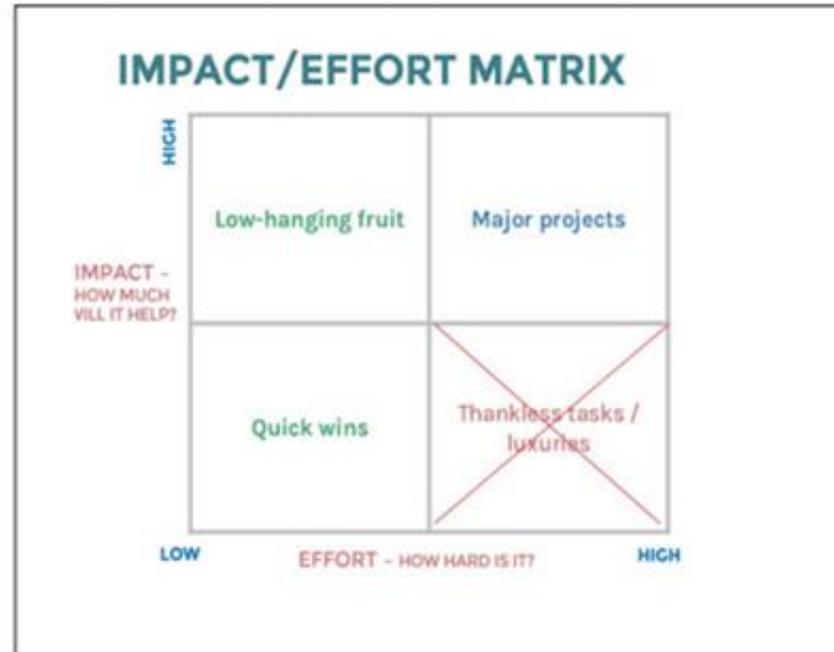
- SWOT (Strength, Weakness, Opportunities and Threats)
- Impact and Ease Matrix
- World Cafe (small group focus groups)



Where are we today?

ENVIRONMENTAL ASSESSMENT

Strengths Characteristics of a business which give it advantages over its competitors	Weaknesses Characteristics of a business which make it disadvantageous relative to competitors
Opportunities Elements in a company's external environment that allow it to formulate and implement strategies to increase profitability	Threats Elements in the external environment that could endanger the integrity and profitability of the business



World Cafe
Sample
Question:

If clinical care facilities and agencies were all adequately staffed with high performing nurses and leaders, what would the School of Nursing be doing to contribute to that success?



Where are we today? ***ENVIRONMENTAL ASSESSMENT***

S K I L L S

Needed planner skills for assessment success?

- Investigative
- Resourceful
- Inclusive
- Creative
- Transparent



Where do we want to be?

PLAN FORMULATION

Based on your assessment:

- Establish strategic priorities
- Operationalize your plan by writing SMART goals
- Clarify roles (e.g., RACI model)
- Clarify authority (e.g., who's the decision-maker?)



Where do we want to be?

PLAN FORMULATION

Start with the foundation:

- **Mission:** An organization's purpose, why the organization exists
- **Vision:** Ideal state that the organization wishes to achieve, is both inspirational and aspirational
- **Values:** Core principles that guide and direct organizational culture (i.e., behavior)



Pro tip!

Don't let your team back out of this crucial step. Without shared understanding of a common goal or purpose, decision-making later will be extra challenging.



Where do we want to be?

PLAN FORMULATION

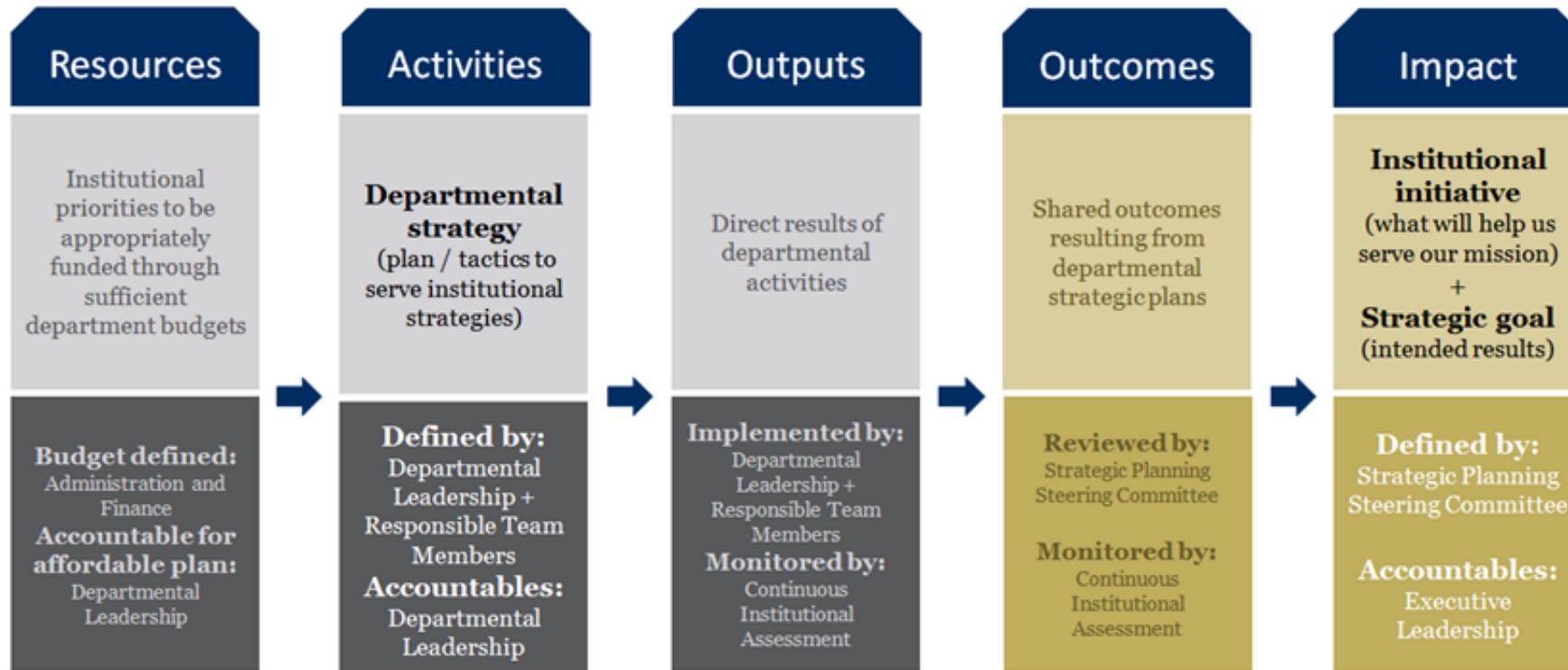
Tool: [Balanced Scorecard](#)

 Financial	<i>Is UNR Med financially healthy? What are the opportunities for new revenue streams?</i>
 Customer	<i>Does UNR Med recruit/retain the student, residents, and faculty likely to serve the health needs of Nevadans? Are the trainees and patients happy with UNR Med?</i>
 Internal Processes	<i>Does UNR Med provide the education/clinical services that our trainees/patients want or need? How can it be done better or more efficiently?</i>
 Learning & Growth	<i>Do UNR Med faculty & staff have the technology and skills they need? How can they learn more from their work and the current trends in the field?</i>



Where do we want to be? *PLAN FORMULATION*

Tool: Logic Model





Where do we want to be?

PLAN FORMULATION



University of Nevada, Reno
School of Medicine



2020-2022 UNR Med Strategic Plan

Priority	Impact Statement	Objective	Outcome metric	Accountable
Strategic recruitment of academic faculty	<i>Grow and retain a faculty base that serves our community's needs.</i>	Improve efficiency and effectiveness of faculty recruitment	From July 1, 2019, net increase faculty hired in priority areas	Jennifer Hagen
		Establish internal and external faculty pipelines	Increase percentage of faculty applicants who identify with at least one mission-based diversity group	
		Invest in faculty career development	% of faculty hired since 2014 met target timelines for promotion and tenure	



Where do we want to be?

PLAN FORMULATION

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- **Provide guardrails:**
 - Clarify the scope
 - Define timelines and horizons
 - Honest look at capacity
- **Encourage creative problem solving:**
 - [“Think inside the box”](#)
 - Ask open-ended questions



How will we get there? *IMPLEMENTATION*

Implementation Planning including:

- Budget Process
- Scorecard
- Communication

Pro tip!

Involve operations, finance and communications early in the planning process-
engaging them at the implementation stage is too late!



How will we get there?

IMPLEMENTATION

Objective	Deliverables	Target Completion	Q1 (Jul-Sept)	Q2 (Oct-Dec)	Q3 (Jan-March)	Q4 (April-June)	Person Responsible
*1. Through community and state collaborations, implement Rochester's First 1,000 Days Initiative.	Ensure LARC is available in 60 percent of AHP practices that care for teens to 21	Q4 (April-June)					LJ, Jeff, Andy
	Enroll 500 women in maternal health initiatives from the URMC Women's Health Practice.	Q4 (April-June)					LJ, Jeff
	Deliver universal coaching - home visitation to 500 families (URMC, RRHS, Jordan).	Q4 (April-June)					Jeff, Dirk, LJ



How will we get there?

IMPLEMENTATION

Metric	Metric Progress			
	5 Year Target	FY2020 Baseline	FY2021 Target	FY2021 Actual
Rates of teen pregnancies in 1) Monroe County and 2) Rochester	25% decrease in Monroe	1) 12 per 1000 2) 29 per 1000 in 2017	decrease	
% of low birthweight babies in Monroe County	25% decrease	8% in 2017	decrease	



How will we get there? ***IMPLEMENTATION***



[Golisano Children's Hospital](#) / Our Strategic Plan

Make a Gift

Our Strategic Plan



Be Part of the Plan

The Golisano Children's Hospital (GCH) Strategic Plan is more than a wish list. It is a living, breathing commitment to *do everything in our power to help each child reach their fullest potential*. The University of Rochester Medical Center has a rich history of improving children's health through game-changing innovations.

<https://www.urmc.rochester.edu/childrens-hospital/our-strategic-plan.aspx>



How will we get there? *IMPLEMENTATION*

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Build momentum and keep it going:

- Coach
- Maintain
 - focus
 - communication
- Look for road blocks and learning opportunities

Taking this back to your organization...

GIP Resources:

- [Strategic Planning Webpage](#)
- [Webinars](#)- Operationalizing, Implementing, Facilitating Plans
- [Strategic Planning Sub-committee](#)

Co-Chairs:

Basma Selim (basma.selim@ucf.edu)

David Hefner (dhefner@msm.edu)



Thank you!

CONTACTS:



University of Nevada, Reno
School of Medicine

Carolyn Brayko, Ph.D. (cbrayko@med.unr.edu)

Director, Organizational Development & Strategic Planning
University of Nevada, Reno School of Medicine

Janice Renfro, MBA (janicerenfro@wustl.edu)

Director of Data Governance
Washington University in St. Louis



Katy Stevenson, MPP (katy_stevenson@urmc.rochester.edu)

Program Administrator, Strategy, Planning and Development
University of Rochester Medical Center



Save the Date

2020 GBA/GIP Virtual Programming: *Moderated Call on the Intersection of Planning, D&I, and Medical School Operations*

Thursday, September 10, 2020

3:00 – 4:00 pm ET

2020 GBA/GIP Virtual Programming: *Faculty Office Space – Research and Strategies to Address Real Versus Perceived Needs Webinar*

Tuesday, October 6, 2020

3:00 – 4:00 pm ET

For more information, please visit our website:

<https://www.aamc.org/professional-development/events/2020-gba/gip-virtual-programming>