Online Planning at WMed

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June 9, 2020

Background

- WMed began in 2011
- First strategic plan was a 2-year plan (developed by 5 people)
- Second strategic plan was a 4-year plan (2014-18) (522 people input)
- Word documents (15 separate focus area plans/50 leaders)
  › Multiple versions
  › No accessible repository
  › Not searchable
  › Difficult to know what was in the plan
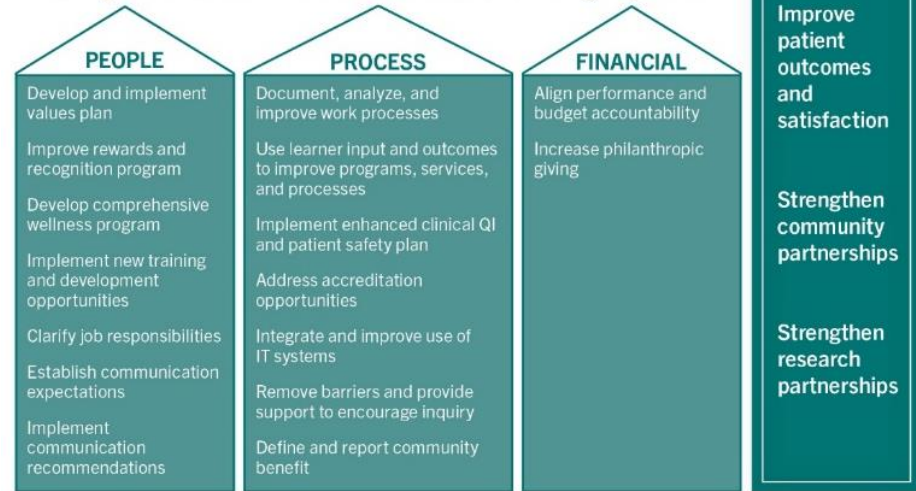
Online Planning Fast Facts

- Online database
- One-time vendor set-up; we maintain templates, lists, tags, etc.
- Implemented in 2016-17
- 4 fiscal years in use
- Repository for 48-50 plans
- Read-only access to all plans (85+ Strategic Planning Leadership Team)
- Contributor (read/write) access to individual plans
- Cost is $13k per year

Strategic Plan 2018-22: Operational Excellence

Goals *support the vision and define what we will achieve*

Outcomes *objective measures of success*

Strategic Objectives *continuous improvement activities that make our strategies actionable*

PEOPLE
- Strengthen values in action
- Increase knowledge and skills
- Improve communication
- Increase engagement (all faculty, employees, alumni)

PROCESS
- Increase process efficiency
- Optimize technology
- Maintain accreditation standards
- Expand inquiry, research, and scholarly activity

FINANCIAL
- Contain costs
- Meet budget targets
- Grow philanthropy

CUSTOMERS & STAKEHOLDERS
users of our programs and services

- Improve learner outcomes and satisfaction
- Improve patient outcomes and satisfaction
- Strengthen community partnerships
- Strengthen research partnerships

Priority Initiatives *annual actions that are linked to strategic objectives*

PEOPLE
- Develop and implement values plan
- Improve rewards and recognition program
- Develop comprehensive wellness program
- Implement new training and development opportunities
- Clarify job responsibilities
- Establish communication expectations
- Implement communication recommendations

PROCESS
- Document, analyze, and improve work processes
- Use learner input and outcomes to improve programs, services, and processes
- Implement enhanced clinical QI and patient safety plan
- Address accreditation opportunities
- Integrate and improve use of IT systems
- Remove barriers and provide support to encourage inquiry
- Define and report community benefit

FINANCIAL
- Align performance and budget accountability
- Increase philanthropic giving

Individual Goals *SMART-defined activities, tasks, or projects that bring the strategic objectives and priority initiatives to life in the work that we do*

W MEDICINE

Medical Education
Deliver high-quality educational programs to prepare learners for the 21st century
- MCAT
- USMLE
- Match rate
- Graduation rate
- Board pass rate
- Program evaluations

Clinical Care
Deliver high-quality, safe, timely, effective, efficient, equitable, and patient- and family-focused care
- Patient satisfaction
- Quality measures
- Access to care
- Patient visits
- Productivity

Research
Expand our culture of inquiry and the impact of our research and discovery
- Peer-reviewed publications
- Grants
- Extramural spending
- Clinical trial revenue

Community Service
Improve the health and prosperity of our communities through strong collaborative relationships
- Community service hours
- Pipeline programs
- Community benefit

Economic Stewardship
Strengthen institutional resources to support the medical school mission
- Financial performance
- Revenue streams
- Endowment and scholarship funds
- Donor engagement

Culture
Foster a vibrant and diverse academic community where all are inspired and valued
- Employee engagement
- Faculty engagement
- Climate survey
- Underrepresented in medicine
- Development opportunities
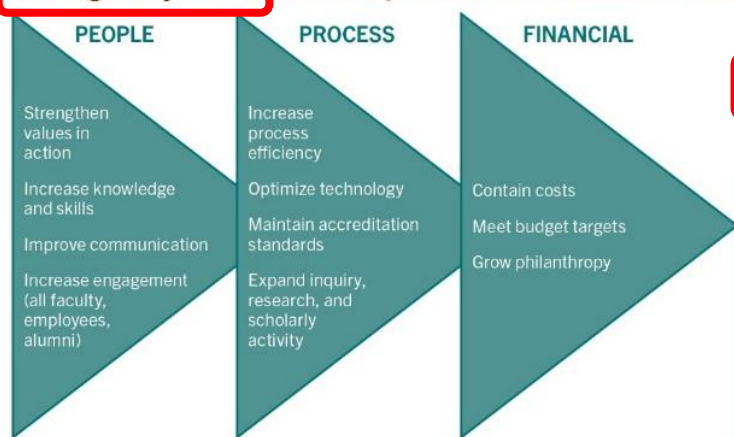
W MEDICINE

Plan Structure

- 4-year plan
  - › Mission, Vision, Values
  - › Strategies
  - › Goals
  - › Actions
    - 1 year annual actions
    - Developed to align with annual operational budget process
    - Written as SMART actions
    - Align with individual faculty and staff annual goals

Strategic Plan 2018-22: Operational Excellence

Strategic Objectives *continuous improvement activities that make our strategies actionable*

PEOPLE	PROCESS	FINANCIAL
Strengthen values in action	Increase process efficiency	Contain costs
Increase knowledge and skills	Optimize technology	Meet budget targets
Improve communication	Maintain accreditation standards	Grow philanthropy
Increase engagement (all faculty, employees, alumni)	Expand inquiry, research, and scholarly activity	

Priority Initiatives *annual actions that are linked to strategic objectives*

PEOPLE	PROCESS	FINANCIAL
Develop and implement values plan	Document, analyze, and improve work processes	Align performance and budget accountability
Improve rewards and recognition program	Use learner input and outcomes to improve programs, services, and processes	Increase philanthropic giving
Develop comprehensive wellness program	Implement enhanced clinical QI and patient safety plan	
Implement new training and development opportunities	Address accreditation opportunities	
Clarify job responsibilities	Integrate and improve use of IT systems	
Establish communication expectations	Remove barriers and provide support to encourage inquiry	
Implement communication recommendations	Define and report community benefit	

Individual Goals *SMART-defined activities, tasks, or projects that bring the strategic objectives and priority initiatives to life in the work that we do*

CUSTOMERS & STAKEHOLDERS

users of our programs and services

Improve learner outcomes and satisfaction

Improve patient outcomes and satisfaction

Strengthen community partnerships

Strengthen research partnerships

W MEDICINE

Goals *support the vision and define what we will achieve*

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W MEDICINE

Plan Items match our strategic plan's structure:
1. Mission, Vision, Values
2. Strategies
3. Goals
4. Actions

Creating Relationships

Plan Items match our strategic plan's structure:
1. Mission, Vision, Values
2. Strategies
3. Goals
4. Actions

FY 2019-20 / STRATEGIC PLAN

Departments and Programs

Navigation to plan for each Department of Program, Administrative Unit, or Focus Area

NOTE: We maintain the navigation to match our organization

Office of Planning and Institutional Effectiveness

🔧 Plan Items   📄 Reports   📁 Documents

FILTER ▾   Sort   Default ▾   ➕ Plan Item ▾

ACTION: Establish a leadership structure and tool kit for continuous quality improvement for the organization by June 30, 2020.

Office of Planning and Institutional Effectiveness   Delayed
1:Annual Action ⇅   7/1/19 - 6/30/20 👤

ACTION: Create and administer an electronic survey to gather community benefit from faculty, residents, and staff by February 1, 2020 and produce the report by June 30, 2020.

Office of Planning and Institutional Effectiveness   Delayed
2:Annual Action ⇅   7/1/19 - 6/30/20 👤

ACTION: Implement revised leadership and staffing to support structure and responsibilities for the Office of the Dean, Planning and Performance Excellence and Institutional Effectiveness & Research

Office of Planning and Institutional Effectiveness   Completed
3:Annual Action ⇅   7/1/19 - 6/30/20 👤

ACTION: Submit LCME status report by August 15, 2019.

Office of Planning and Institutional Effectiveness   Completed
4:Annual Action ⇅   7/1/19 - 6/30/20 👤

Show   10 ▾   Viewing 1-6 of 6

Edit Plan Item

Template: Annual Action

Action Number *

Enter X.XX as the appropriate action item number

> 1

Annual Action Description *

Enter SMART Action description (Specific, Measurable, Agreed, Realistic, Time-Bound)

> ACTION: Establish a leadership structure and tool kit for continuous quality improvement for the organization by June 30, 2020.

Start *

> 07 / 01 / 2019

End *

> 06 / 30 / 2020

Threshold

Enter Threshold Target (Minimum Expectations) 90% Likelihood

> Form the Quality Improvement Committee and train members in lean

Target

Enter Target (Meets Expectations) 60% Likelihood

> Form the Quality Improvement Committee, train members in lean, and establish CQI toolkit

Stretch Target

Enter Stretch Target (Exceeds Expectations) 20% Likelihood

> Form the Quality Improvement Committee, train members in lean, establish CQI toolkit, and complete one CQI initiative

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👥 Permissions   ↕ Related (1)   🕐 History

**Supports
(Connected Up)**   ➕ Supports

CULTURE   ⊗
WMed Strategy

This Item

**Supported By
(Connected Down)**   ➕ Supported By

No Connections have been added.

Culture

Foster a vibrant and diverse academic community where all are inspired and valued

- Employee engagement
- Faculty engagement
- Climate survey
- Underrepresented in medicine
- Development opportunities

W MEDICINE

Progress

Delayed ▼

Providing Department *

✎ Office of Planning and Institutional Effectiveness

Strategic Objective

Select ONE Strategic Objective or (in the next box) select ONE Priority Initiative that best fits your Annual Action.

PEOPLE: Increase knowledge and skills ▼

Priority Initiatives

Select ONE Priority Initiative or (in the box above) select ONE Priority Initiative that best fits your Annual Action.

▼

Resource Tags

Check all that apply (does this action item require budget, equipment, facilities, FTEs, or IT)

☐ Budget

☐ Equipment

☐ Facilities

☐ FTEs

☐ IT

Accreditation Tags

Check all that apply

☐ AAHRPP

☐ ACCME

☐ ACGME

☑ CQI

Strategic Objective

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PEOPLE: Increase knowledge and skills ▼

CUSTOMERS: Improve learner outcomes and satisfaction

CUSTOMERS: Improve patient outcomes and satisfaction

CUSTOMERS: Strengthen community partnerships

CUSTOMERS: Strengthen research partnerships

FINANCIAL: Contain costs

FINANCIAL: Meet budget targets

FINANCIAL: Grow philanthropy

PROCESS: Increase process efficiency

PROCESS: Optimize technology

PROCESS: Maintain accreditation standards

PROCESS: Expand inquiry, research, and scholarly activity

PEOPLE: Strengthen values in action

PEOPLE: Increase knowledge and skills

PEOPLE: Improve communication

PEOPLE: Increase engagement

W MEDICINE

Progress

Delayed ▼

Providing Department *

☑ Office of Planning and Institutional Effectiveness

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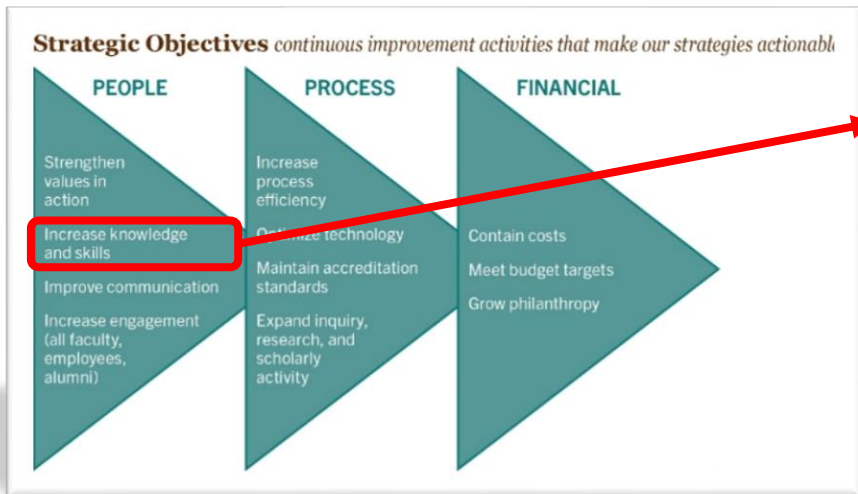
▼

Resource Tags

Check all that apply (does this action item require budget, equipment, facilities, FTEs, or IT)

☐ Budget

☐ Equipment

☐ Facilities

☐ FTEs

☐ IT

Accreditation Tags

Check all that apply

☐ AAHRPP

☐ ACCME

☐ ACGME

☑ CQI

Strategic Objective

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PEOPLE: Strengthen values in action
PEOPLE: Increase knowledge and skills
PEOPLE: Improve communication
PEOPLE: Increase engagement

Strategic Objectives *continuous improvement activities that make our strategies actionable*

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FINANCIAL
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W MEDICINE

Quarter 3 Status Update

Enter quarterly status update here

File   Edit   View   Insert   Format   Tools   Table

↶ ↷ | Paragraph ∨ | **B** *I* | ☰ ☰ ☰ ☰ | ⇤ ⇥ | ☰ ∨ ☰ ∨

This goal has been impacted by the COVID-19 pandemic. Lean training scheduled for March 23-27, 2020, was canceled. Virtual lean training will be held June 1-5, 2020. A draft toolkit was created that includes PDCA/PDSA model and the theme of Operational Excellence. An Operational Excellence brand with logo has been created. Development of materials and a communication plan continues although no implementation will occur until normal business resumes and the pandemic is lifted.

Quarter 4 Status Update

Enter quarterly status update here

File   Edit   View   Insert   Format   Tools   Table

↶ ↷ | Paragraph ∨ | **B** *I* | ☰ ☰ ☰ ☰ | ⇤ ⇥ | ☰ ∨ ☰ ∨

This action item is being carried forward into FY 2020-21 and will be revised in light of the setbacks due to the COVID-19 pandemic.

Outcome

Enter Actual Performance Outcome (Quantitative objective measure; refer to original Threshold, Target, or Stretch)

Final Assessment

Enter the appropriate outcome assessment

Final Assessment

Enter the appropriate outcome assessment

Threshold Target Met (Minimum Expectations)

Target Met (Meets Expectations)

Stretch Target Met (Exceeds Expectations)
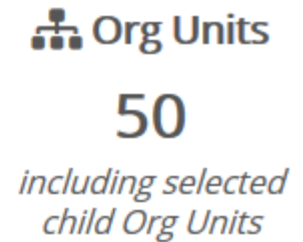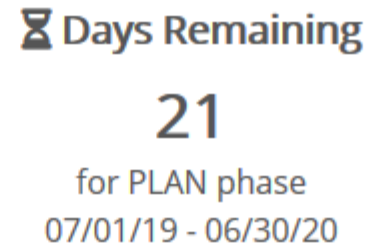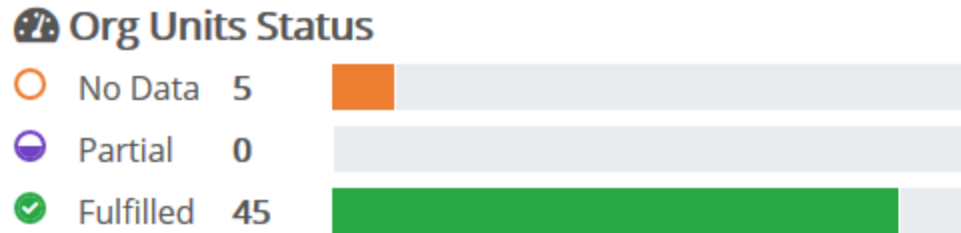
Did Not Meet

Summary

- System serves its purpose
- Eliminated duplicate versions
- Facilitates transparency
- Enables centralized reporting
- Mixed engagement by users
  - › 50% enter quarterly updates within specified timeline
  - › Evaluate root causes for low completion rate
  - › Implement countermeasures to improve completion rate