
How to Keep a Strategic Plan Moving

AAMC GIP Strategic Planning Subcommittee
1/10/24

Erin Shirey, MPA
Director of Planning, Strategy, and Partnerships
erinshirey@Oakland.edu



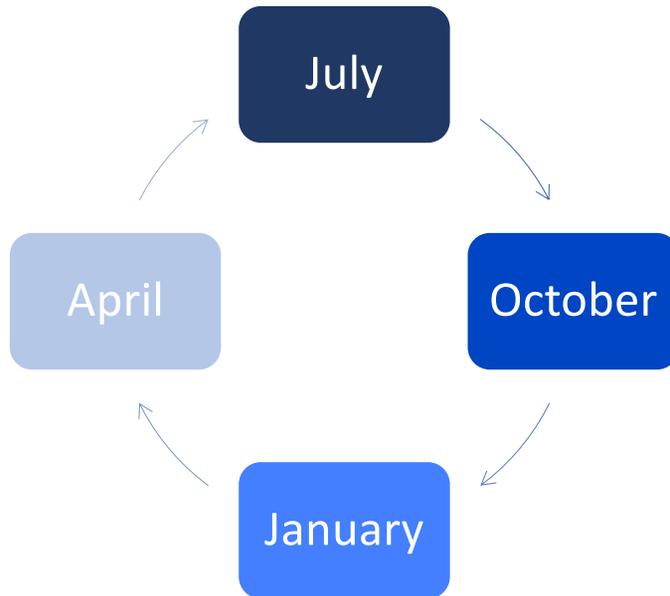
OAKLAND UNIVERSITY WILLIAM BEAUMONT



Agenda

- OUWB's process
- Lessons learned
- Questions
- Group discussion

OUWB Planning Cycle



- Implement
- Monitor
- Report
- Revise

OUWB Implementation: Timeline and Tracking

|  2022-25 Strategic Planning Implementation | | | | | | YEAR 1 | YEAR 2 | YEAR 3 |
|---|---|---|--|------------|-----------------------------------|----------------|--|-----------------------------------|
| | | | | | | 2022-23 | 2023-24 | 2024-25 |
| # | Strategy | Champion(s) | Actions | Deadline | | 7/1/22-6/30/23 | 7/1/23-6/30/24 | 7/1/24-6/30/25 |
| Stewardship | | | | | | | | |
| S.2 Ensure OUWB's infrastructure supports the needs of the school | | | | | | | | |
| S.2.1 | Ensure facilities align with OUWB's short-term needs through 2025 | Vice Dean for Business and Administration | 1. Develop a plan for OUWB to remain on the 'split campus' model to ensure optimum utilization of current space at OU and BH campuses. | AY 2022-23 | Design, approve, funding, approve | | New space 'online' | |
| S.2.2 | Formulate and commit to a plan for a new medical school building to meet OUWB's long-term needs | Vice Dean for Business and Administration | 1. Identify the funding needed to support a new building 2. Finalize building location 3. Establish a building, facilities, and staffing plan to support the entire four-year curriculum | AY 2023-24 | Discussion document complete | | Engage philanthropy in fundraising efforts Complete conversations with parent organizations Location/ site finalized | Plan for future space established |

OUWB Implementation: Detail

| Goal Area | Goal # | Goal | Strategy # | Strategy | Action(s) | Outcome(s) | Metrics | Champion | Team | Deadline | Integration/ Implementation |
|--------------------------------|--------|--|------------|---|--|---|---|-----------------------------------|------------------------------|----------|--|
| Diversity, Equity, & Inclusion | DEI.3 | Build a more diverse community, reflective of those we serve | DEI.3.1 | Create programming aimed at providing pathways for students at all education levels | Develop programs aimed at pre-med/ health science undergraduate students | Programs developed Tracking of students to determine matriculation | Program developed- Y/N Student matriculation | Director of Diversity & Inclusion | Diversity & Inclusion Office | 6/1/23 | <p>4/2022- Research other programs/ best practices</p> <p>8/2022- Develop program structure</p> <p>10/2022- Identify funding</p> <p>12/2022- Identify pathway team/ faculty</p> <p>3/2023- Develop marketing materials; market to, recruit, and select participants</p> <p>6/2023- Implement program</p> |

OUWB Monitoring: Dashboard



Strategic Planning Dashboard

Goal Area: Education

Date: 3/2/23

Goal 1: Provide students with an outstanding medical education

Strategy E.1.2: Ensure high-quality clinical training resources to support M3/M4 clerkships NOTE: This table contains all mock data.

| Outcome | Metric ^ | Measure | Current Year-2022 Grads | Previous Year-2021 Grads | Current Year vs Previous Year | Benchmark | Current Year vs Benchmark |
|-----------------------|--------------------|---------------------|-------------------------|--------------------------|-------------------------------|-----------|---------------------------|
| Quality of Clerkships | Emergency Medicine | % Excellent or Good | 98.50% | 98.50% | — | 98.50% | ✓ |
| Quality of Clerkships | Internal medicine | % Excellent or Good | 91.00% | 92.00% | ▼ | 95.00% | ▼ |
| Quality of Clerkships | Neurology | % Excellent or Good | 82.00% | 99.99% | ▼ | 100.00% | ▼ |
| Quality of Clerkships | Pediatrics | % Excellent or Good | 81.00% | 77.00% | ✓ | 86.70% | ▼ |
| Quality of Clerkships | Sugery | % Excellent or Good | 79.50% | 79.50% | — | 79.60% | ▼ |

| Strategy # ^ | Strategy | Outcome | Deadline | Status |
|--------------|--|--|------------|----------|
| E.1.3 | Provide flexible pathways and alternatives of training for OUWB students | Masters of Medical Science Degree available to award | 2024-09-01 | On track |
| E.1.4 | Create a body donation program within OUWB | Program in place to accept donations | 2022-10-01 | Complete |

Key:

✓ Positive Change/Goal or Benchmark Met
 ▼ Negative Change/ Goal or Benchmark Unmet
 — No Change

Lessons Learned

Things that didn't work for us:

- Having large committees oversight.
- Including colleagues that don't have the 'power' or expertise to move efforts forward.
- Presenting or reviewing only on an annual basis.
- Not visually monitoring metrics.

Tips:

- Know your school and your leadership.
- Make your strategic plan as specific as possible; aids implementation.
- Have a 'face' or point person for planning.
- Be a champion for the process and the plan but remain flexible.

Questions/Discussion

For me:

1. Any questions?

For you:

1. What do you do at your institution?
2. What have been your challenges?
3. What have been your triumphs?
4. Are you trying anything new/planning any change?

