



Automating Accreditation and Strategic Planning - a Transformative Dashboard Solution

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THE UNIVERSITY OF ARIZONA
College of Medicine
Tucson

What Problem Do We Try to Solve?

The Accreditation Mandate

LCME Standard 1.1 requires that medical schools:

-  **Engage in Strategic Planning & CQI**
-  **Establish Measurable Programmatic Goals**
-  **Monitor Compliance with Accreditation Standards**
-  **Use Data to Drive Educational Improvements**

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What Problem Do We Try to Solve?

The Core Challenge at COM-T



Traditional Methods (2021):

Excel-based tracking

Manual, disjointed updates

Labor-intensive data collection

Difficult to ensure version control and real-time insights



Lack of System Integration:

No centralized platform for planning, monitoring, and CQI



Time-Consuming & Error-Prone:

Strategic processes were siloed and reactive rather than proactive

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What Problem Do We Try to Solve?

A Turning Point (2022)



Recognized the Need for Transformation



IT Got Involved



Initial Goal: To develop a **simplified, integrated, and sustainable solution** that **maximizes automation** in support of strategic planning, continuous data collection, and streamlined reporting.

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Our Solution: S P E E D

What Is SPEED?

Strategic Planning eSubmission & eReporting Dashboard - a custom-built platform designed to simplify, unify, and automate strategic planning and reporting at COM-T.

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Our Solution: S P E E D

Core Objectives

Reduce Administrative Burden

Minimize manual data entry by enabling IT to **preload data** through automation, allowing departments to focus on planning rather than paperwork.

Enhance Data Visualization

Replace static reports with a **real-time dashboard** that displays strategic goals and progress through clear, automated visual insights.

Enable Continuous Input

Support **year-round data collection** with flexible submission windows and ongoing updates

Promote Transparency

Make strategic plans and outcomes **accessible across the College**, encouraging collaboration, accountability, and alignment with LCME expectations.

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SPEED Framework: Key Terms

Vision

A concise, forward-looking statement that defines the ideal future state of a mission area.

Example: "**Developing a sustainable and balanced academic faculty workforce.**"

Metric

A category or indicator used to track progress toward the vision. It reflects *what aspect* of performance is being monitored.

Example: "**Faculty by rank.**"

Measure

A specific, quantifiable data point collected for a metric. It reflects the *actual value* used for assessment.

Example: "**Number of assistant professors.**"

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SPEED Framework: Key Terms (Continued)

Mission	No. of Visions	No. of Metrics	No. of Measures
Faculty Affairs	2	8	23
Education	4	9	16
Research	4	14	15
Clinical	1	3	28
Finance	1	7	7
Development	2	5	5
Communication	2	3	4
Total	16	49	98

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SPEED Framework: Key Terms for Each Measure (continued)

Current State

An indicator where the measure stands today.

Example: **"17 assistant professors by the end of FY24"**.

Goals / Result

An indicator that guides the direction of work in the measure.

Example: **"16 assistant professors by the end of FY25"**

Tactics

Specific actions or initiatives designed to achieve the stated goals.

Example: **"Launch a mentorship program for assistant professors."**

Comment

Optional notes providing context, clarification, or additional detail for goals, tactics, or measures set by the Dean and chairs.

Example: **"Recruitment plan pending approval"**

Color Code

A visual status indicator (red, yellow, green) used to track progress or level of attention needed for each measure.

Example: **"Yellow – In progress, but facing delays."**

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Capturing Strategy in Action: Goals, Tactics, and Results



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Dept: Neurology

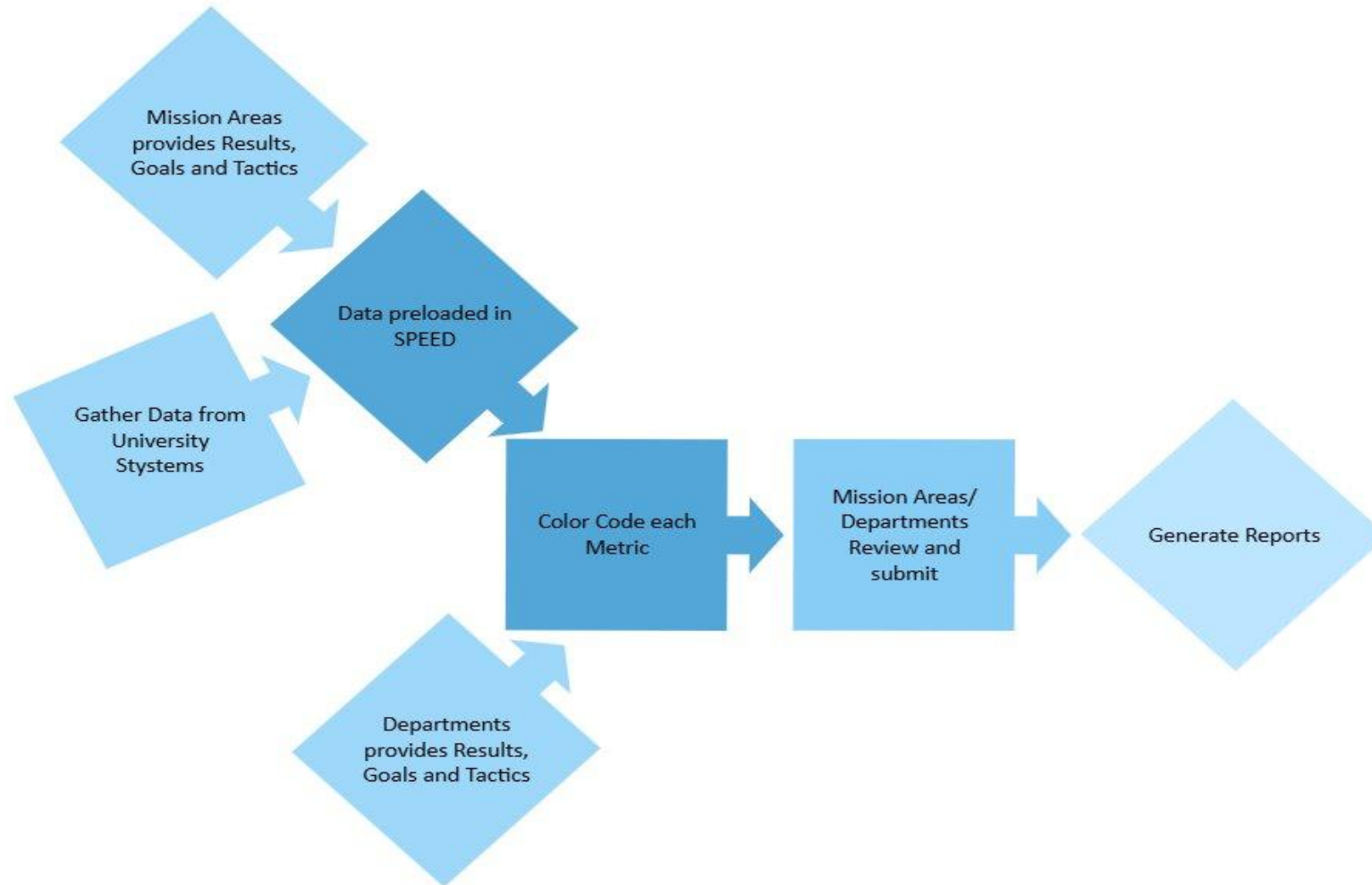
Strategic Plan for Faculty Affairs Mission - Report (1.4)

Vision:Developing a sustainable and balanced academic faculty.

Metric	Measure	Current State FY24 (July 2023 to June 2024)	YR1 Goal FY25 (July 2024 to June 2025)	YR1 Results FY25 (entered by May 1, 2025)	YR2 Goal FY26 (July 2025 to June 2026)	YR3 Goal FY27 (July 2026 to June 2027)	YR4 Goal FY28 (July 2027 to June 2028)	Tactics	Comment	Color
(1) Faculty by Rank	# of Assistant Professor	17	16	21	24	27	30	Currently recruiting for 9 open positions including general and subspecialty neurology. Balance of recruitment into majority clinical positions while supporting academic development. Supporting promotion of current faculty.		
(1) Faculty by Rank	# of Associate Professor	10	14	8	9	11	13	Recruiting stroke and child neurology division chiefs. Targeting recruitment of experienced faculty to better balance needs for mentoring and experience. Mid-career physician scientists positions being created. Supporting promotion of current faculty.		
(1) Faculty by Rank	# of Professor	7	6	8	9	10	11	Supporting promotion of current faculty. Recruiting stroke and child neurology division chiefs.		

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Technology Used



MS SQL Server



Power Platform – Power Apps



Power BI










Active Directory for Access Control

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System Features

-  Single Sign On for Seamless Access
-  Role-Based Access Control (5 groups managed by Grouper)
-  Integrated Data Sources (PubMed & local sources)
-  Interactive & Verifiable Data
-  Flexible Data Export or Excel or CSV
-  Unified Guidance & Support
-  Real-Time Reporting & Oversight

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Project Management/Implementation Process

- Obtained requirements
- Selected methodology conforming to COM-ITS development principles
- Established “mission areas” with designated leader support
- Launched communication/training plan
 - Division directors engaged auditing system access
 - Instructional, introductory emails
 - In person, virtual, online training
 - Workgroup approves (vets) ongoing changes in functionality and data
 - Reminder emails
- Lessons Learned

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Iterative Processes & Continuous Improvement

(Agile Project Management - Principles)

- **Collaboration between sponsors and developers**
 - Created a workgroup to work as a change control board
- **Deliver working software frequently**
 - Focus on delivering working software in increments rather than waiting for a final product
 - Strategic planning process different than timeline to receive and consume reporting data
 - System updated with data as it was available
 - Data pre-populated and built on from previous years
 - Began getting data from PubMed, Tech Launch Arizona, UA Analytics
- **Promote sustainable development**
 - The ability to “open” & “close” system at specified intervals allowed sponsors, developers, and users to add/report data at a constant pace to maintain timelines
- **Customer satisfaction through early and continuous delivery**



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Communication

- Close, personal contact with users
- “Pre-season” message to department heads verifying account access
- Season “kick-off” message to all users
- Training offered throughout the data collection period
- Monthly updates to all users giving stats, friendly competition, encouraging participation ...
- Three weeks to close, One week to close




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Website & Training Materials



[SPEED 1.4 Video](#)



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SPEED

The Strategic Planning eSubmission and eReporting Dashboard (SPEED) is a software solution developed by COMIT to streamline the strategic planning data collection and reporting process for the College. The primary objective of this solution is to alleviate the traditional data collection and entry burden on departments, while also enhancing data visualization and presentation through atomization. The reports generated by SPEED are accessible to both departmental units and college administration as data is continuously collected and entered throughout the year.

To consume the SPEED dashboard, you will need to get an active UA NetID account and read/write permission to the data as per your role. **Please contact COM IT through [COMHelp](#) to request the required permission.**

We've made key updates to SPEED 1.4 this year. Watch our [3-minute video](#) to see what's new. You may watch our [1.3 video](#) for updates from the last year.

If you're looking for our presentation slides from our user training sessions, you can find them here:

- [SPEED User Guide v1.4.pptx](#)
- [SPEED User Guide v1.3.pptx](#)

And for answers to frequently asked questions, please check out our [FAQ](#).

[ACCESS SPEED 1.4 >>>](#)

[ACCESS SPEED 1.4 REPORTS >>>](#)

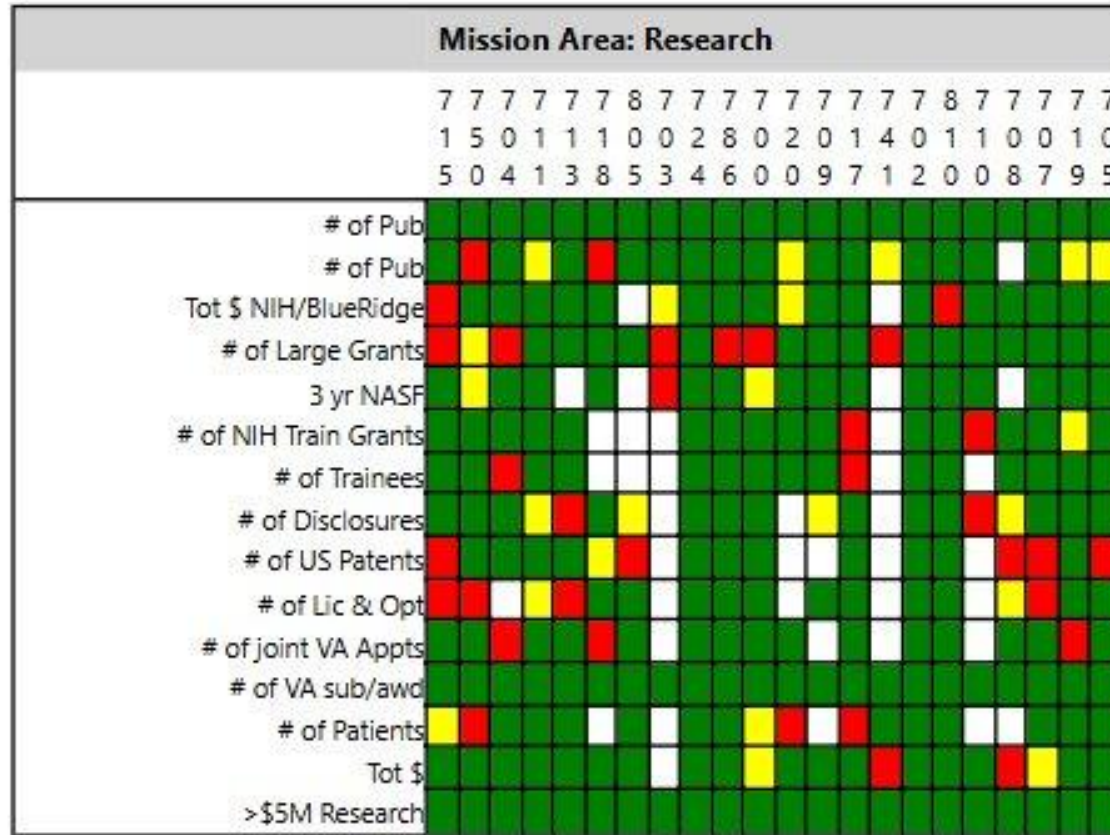
Department Engagement Report

Dept Engagement Status																					
Department Type	Basic Science					Clinical															
Mission	705	707	708	710	719	700	702	703	704	709	711	713	715	717	718	720	724	741	750	786	805
Faculty Affairs Mission	71%														61%						
Education Mission						70%	40%		40%	20%		60%	40%				40%				40%
Research Mission								64%		64%								71%			
Clinical Mission						56%	33%	44%	33%	30%	44%		22%	44%	44%	33%		33%	33%	44%	56%
Finance Mission															50%			50%			
Development Mission	38%	44%		38%														38%			
Communication Mission	25%	50%		0%	50%		50%	50%		0%					0%			50%			25%

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Heatmap



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PEARL (Planning, Evaluation, Admin Reporting Links)

Department:

[Unit Performance](#)

[Chair Review](#)

Dept Link: <https://www.fcm.arizona.edu/>

Strategic Planning Metrics: Family and Community Medicine,

Mission	Vision	Metric	Measure	Current State FY22	Current State FY23	Current State FY24	Trend by FY
Faculty Affairs Mission	Developing a sustainable and balanced academic faculty.	(4) Annual Faculty Recruitment and Turnover	# of Recruitment	5	10	4	
Faculty Affairs Mission	Developing a sustainable and balanced academic faculty.	(4) Annual Faculty Recruitment and Turnover	# of Turnover	2	3	3	
Faculty Affairs Mission	Creating career growth and leadership pathways for all academic faculty.	(8) Career Development Outcomes	# of Faculty Leaders Developed	4	6	4	
Access, Community, and Belonging (ACB) Mission	Creating a culture of diversity and inclusive excellence.	(5) Monitor Number of Access, Community, and Belonging (ACB)-credit eligible events hosted by your unit	Monitor Number of events	5	8	8	

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What Went Well



- Leadership motivation and support.
- Steering committee and working group.
- Business analysis (requirements gathering).
- Reliance on project management methodologies.
- Agility & adaptability of project team & technology.
- Technology selection.
- Simple account provisioning process.
- Varied training materials & training options were appreciated by users.
- Departments appreciated a centralized, standardized form to collect annual strategic planning data (vs. Box files, Excel documents, etc.)
- Communication.
- Disaster recovery plan.

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What Didn't Go So Well



Annual Planning Cycle Design

Balancing data preload, entry deadlines, and reporting windows proved complex, requiring better alignment with real-world data availability timelines.



System Success Invited Goals and Metrics Changes

As adoption grew, changes in vision, metrics, and measures led to confusion and rework, creating burdens from the need for structured version control.



Leadership and Staff Turnover

Transitions in key roles impacted consistency and continuity in system design and planning execution.








Network Latency Issues

Delays in accessing the data update form affected user experience workflow efficiency.

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Future Development

-  **Support for Unit-Level Strategic Planning**
Extend SPEED's functionality to help departments create and manage their own localized strategic plans aligned with college-wide goals.
-  **PEARL: Unit Reporting System**
Integrate with PEARL (Planning, Evaluation, Admin Reporting Links) to enable data sharing and support performance monitoring in units' day-to-day operations.
-  **AI-Assisted Analysis**
Leverage LLMs to provide insights, detect patterns, and suggest improvements based on historical trends and current performance.
-  **Narrative & Qualitative Reporting Module**
Allow units to document context, lessons learned, and progress stories alongside quantitative metrics.
-  **Department Chair Performance Review Integration**
Link strategic goal outcomes with leadership reviews to support evidence-based evaluation and accountability.

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COM ITS Project Team

- **Sheila Bustamante**, Director, Education Technologies and Innovation
- **Susan Malin**, Project Manager
- **Chandanpreet Punia**, Data Engineer
- **Vana Sherchand**, Director, Data Reporting
- **Viet Ton That**, Business Intelligence Specialist
- **Ed Xia**, Assistant Dean, IT Services

“...SPEED has been very helpful. I don’t think the departments would be speaking the same language except for the tool...”



Project sponsors and key partners:

- **Dr. Michael Abecassis**, Dean COM-T
- **Dr. Anne Cress**, Vice Dean, Strategy & Innovation
- **Dr. Jameshia Granberry**, Executive Director, Administrative Operations / Chief of Staff
- **Gracialinda Colmenero**, Administrative Strategy Manager

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Q & A

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