Communicating with a New Leader

Strategic Plans
Portfolio Data
Governance
Emergency
Controllable/Uncontrollable Expenses

Faculty Compensation
Environmental Assessment
Budget and Revenue
Health System Dashboards & Business Intelligence Tools
Space Portfolios

Learn
Serve
Lead
Communicating with a New Leader

This resource will help Principal Business Officers who are undergoing a leadership change

The purpose of the resource is threefold:
1) to provide a list of the topics, issues, and information that are typically included in a new dean briefing book;
2) to include examples of these materials and effective ways to present this information; and
3) to help PBOs identify the critical information that should be shared with a new dean in the first 30 days, 60 days and 90 days.

Conversations to have with your new leader:
These topics would not be included as documents in the resource book, but would best be covered through conversations.

- Historical backroom deals
- Institutional culture
- Thought leaders at the school
- Areas of risk and litigation
- Disclosure of all of the financial commitments/liabilities (startup packages, hires, etc.) and reserves the school has on the books

Prioritized information should be shared within the first 30 days, other information should be shared within 60 days. Prioritized information is noted with asterisks.

Use the checklist to develop an objective, straightforward look into your institution.

Advice from those who have been through a leadership change

The complete package vs. piecemeal
Learn how your new leader prefers to receive information. Do they prefer to receive information from various stakeholders in different briefing books or a complete package?

Presentation Style
When compiling information from various colleagues, make sure the materials presented are orderly and consistently. The materials should be professional looking, not simply thrown together in a binder.

Negotiations
This can be a critical time to secure a commitment to address long-standing funds flow issues between the hospital and parent university around indirect cost recoveries, mission support, tuition, state appropriations, etc.

Credibility
There is an important role for the PBO in this—helping everyone pull together this information and presenting it to the new dean in a clear, coherent way will go a long way toward establishing and enhancing the credibility of the PBO.

Association of American Medical Colleges
### Portfolio Data*

*Including medical school data as a percent of the total university/campus portfolio – the medical school as a percent of the total university*

- Revenue by Mission
- Research Portfolio
- Faculty Population - tenure vs. non-tenure
- Staffing
- Diversity
- Space and Facilities
- Foundation/Philanthropy
- Comparative Outcomes Data
  - US News & World Reports
  - AAMC
  - Data (GBA metrics, MSPS)
  - NIH
  - Medical School Mission Management Tool (MSMMT)
  - Other
- Top 20 Faculty by Mission - researchers, clinicians, teachers

### Health System Dashboards & Business Intelligence Tools*

- Medical Center/Hospitals
- Faculty Practice

### Governance*

- Organizational Charts - including direct reports
- Governance Structure
- Key Committees
- Leadership Biographies with Pictures
- Relationship Between School and Hospitals
- Most Recent Department/Chair Reviews

Prioritized information, noted with asterisks, should be shared within the first 30 days.
| Funds by Source - including state appropriation figures |
| Tuition |
| Research and Indirect Cost Recoveries |
| Funds Flows |
| The School and Hospital(s) |
| School and Parent Institution |
| Affiliates |
| GME - financial structure of residency program |
| Practice Plan Information |
| Dean’s Tax |
| Dean’s Cash Flow/Discretionary Funds |
| Budget Process |
| Endowments/Foundation Income - Restricted and Unrestricted Funds |

Prioritized information, noted with asterisks, should be shared within the first 30 days.
Controllable/Uncontrollable Expenses

- Financial Summary Spreadsheets
- Hospital Financial Statements and Operating Reports
- Department P&Ls

Faculty Compensation

- Compensation Structure/Plan
- Effort/Productivity/Funding Availability

Environmental Assessment

- Recent Market Trends in the Area
- State Laws that May Impact the School

Emergency Preparedness

- Disaster Recovery
- Communication Plan
- Business Continuity
- Preparedness - IT, Infrastructure