

# Morehouse School of Medicine

## Strategic Planning Initiative

*Steering Committee Kickoff Meeting*  
*July 2, 2014*

# STRATEGIC PLANNING

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## *THE APPROACH*

AMC Strategies, LLC



Strategic Consultants to **Academic Medical Centers**

[www.amcstrategies.com](http://www.amcstrategies.com)

## AMC Strategies' Clients

- Cedars-Sinai Health System
- Children's Hospital of Orange County
- City of Hope National Medical Center
- Columbia University College of Physicians and Surgeons / New York Presbyterian Hospital\*
- George Washington University Medical Center
- Georgetown University Medical Center
- Lucile Packard Children's Hospital at Stanford
- Macquarie University Hospital & Australian School for Advanced Medicine (Sydney, Australia)
- Partners Harvard Medical International
- Stanford University: School of Medicine, Stanford Hospital & Clinics, School of Earth Sciences
- The Brooklyn Hospital Center (Brooklyn, NY; affiliated with Weill Cornell Medical College)
- Texas Medical Center (Houston, TX)\*
- The Methodist Hospital (Houston, TX)
- The National Academies of Sciences
- University Hospitals Health System (Cleveland, OH)
- University at Buffalo (SUNY) School of Medicine and Biomedical Sciences
- University of California, Davis, Health System
- University of California, Irvine School of Medicine & Medical Center
- University of California, Los Angeles, David Geffen School of Medicine / UCLA Health System\*
- University of California, San Francisco\*
- University of California, Santa Barbara
- University of California, San Diego, Health System
- University of Cincinnati Health Sciences Center
- University of Iowa: UI Health Care, Carver College of Medicine, University of Iowa Foundation
- University of Rochester Medical Center
- University of Southern California: Keck School of Medicine and Keck Medical Center
- University of Utah / University Health Care
- Washington University School of Medicine / St. Louis Children's Hospital

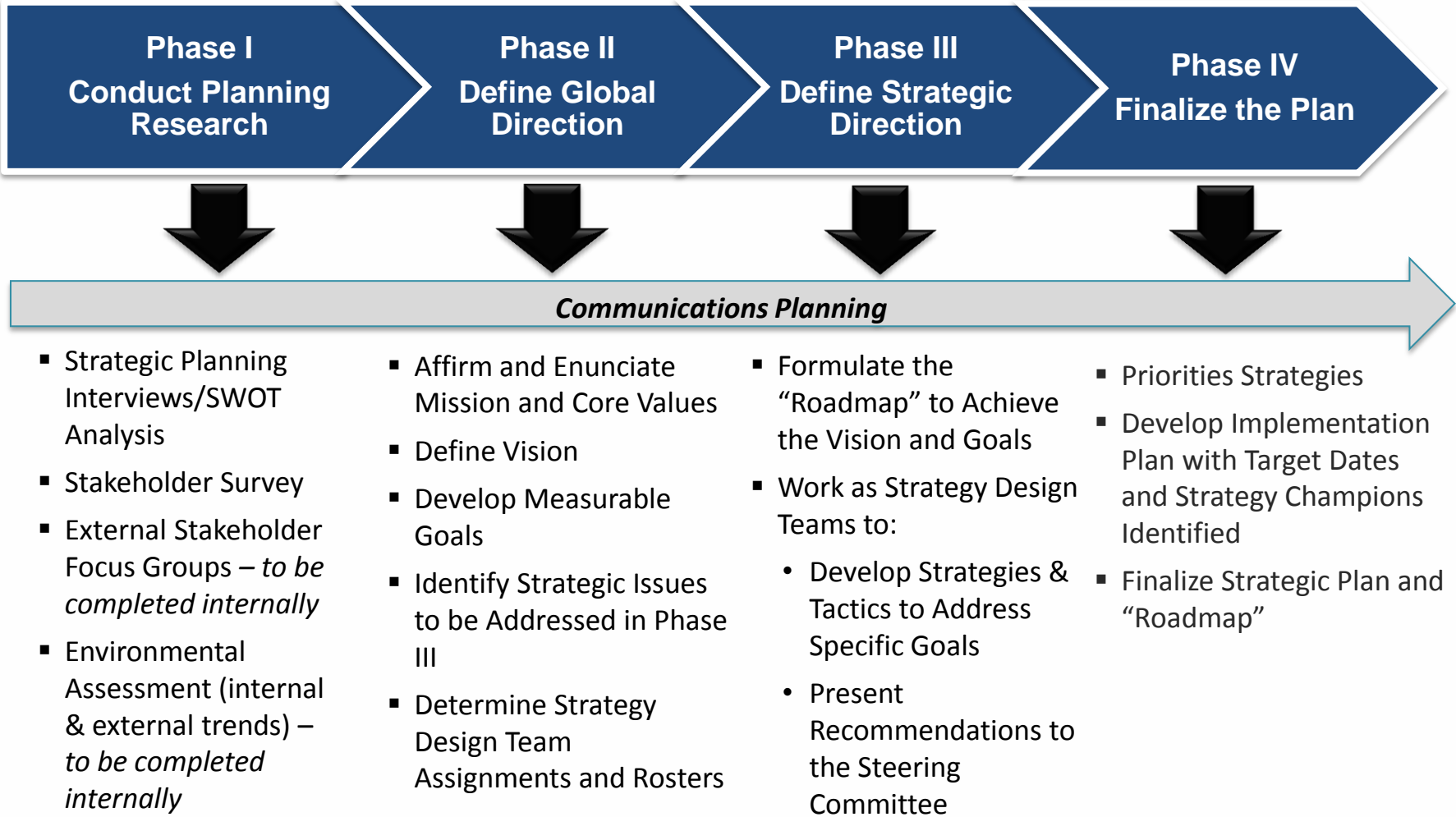
## Relevant Engagements – Schools of Medicine Comprehensive Strategic Plans

- Columbia University College of Physicians and Surgeons
- George Washington University Medical Center
- Lucile Packard Children's Hospital at Stanford
- Macquarie University / Australian School for Advanced Medicine (Sydney, Australia)
- University of California, Davis, Health System
- University of California, Irvine School of Medicine
- University of California, Los Angeles, David Geffen School of Medicine
- University of California, San Francisco
- University of Cincinnati Health Sciences Center
- University of Iowa Carver College of Medicine
- University of Rochester Medical Center
- University of Utah School of Medicine
- Washington University School of Medicine

**The AMC Strategies' Philosophy... All Strategic Plans Must Answer Four Basic Questions:**

- |   |  |  |
|---|--|--|
| ▪ <b><i>Where is the Organization Today?</i></b>                |    | ▪ <b>Environmental Assessment</b> <ul style="list-style-type: none"><li>– External data analysis &amp; interviews</li><li>– Internal data analysis &amp; interviews</li></ul>                            |
| ▪ <b><i>Where Should the Organization be in the Future?</i></b> |    | ▪ <b>Strategic Vision</b> <ul style="list-style-type: none"><li>– Key strategic implications</li><li>– Mission &amp; vision statements</li><li>– Guiding principles</li><li>– Measurable goals</li></ul> |
| ▪ <b><i>How Should the Organization Get There?</i></b>          |   | ▪ <b>Strategy Formation</b> <ul style="list-style-type: none"><li>– Strategies &amp; tactics</li></ul>   |
| ▪ <b><i>Is the Organization Getting There?</i></b>              |  | ▪ <b>Implementation Planning/<br/>Monitoring/Communicating</b>   |

The Strategic Planning Process



The MSM Strategic Planning Timeline

	2014							2015
	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN
Preliminary Planning/Logistics								
PHASE I: CONDUCT PLANNING RESEARCH								
Activity 1: Interviews		X						
Activity 2: External Stakeholder Focus Groups								
Activity 3: Stakeholder Survey								
Activity 4: Environmental Assessment								
Steering Committee Kickoff Meeting		X						
PHASE II: DEFINE GLOBAL DIRECTION								
Steering Committee Strategic Planning Retreat				X				
PHASE III: DEFINE STRATEGIC DIRECTION								
Strategy Design Team Meetings (monthly)					X	X	X	
Steering Committee Meetings (monthly)					X	X	X	
PHASE IV: FINALIZE PLAN/IMPLEMENTATION PLNG								
Steering Committee Meeting								X

X = Strategic Planning Steering Committee meetings



# IMMEDIATE PLANNING NEXT STEPS

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## *PHASE I: CONDUCT PLANNING RESEARCH*

## Phase I Analytical Activities

### Qualitative Assessment

#### Activity 1

#### 50 Internal Interviews

- Senior Leadership
- Faculty
- Staff
- Students and Trainees

#### Activity 2\*

#### External Stakeholder Focus Groups

- Current strengths/weaknesses of the SOM
- Issues to be addressed in the plan
- Greatest opportunities for the future

#### Activity 3

#### Stakeholder Survey (Follows completion of Activity 1)

- Validate strategic priorities from Activity 1
- Solicit institution-wide input on core values and strategic issues

### Quantitative Assessment

#### Activity 4\*

#### Environmental Assessment

- Clinical Services
- Education
- Research
- Resources

*\*To be completed by in-house Morehouse team with guidance from AMC Strategies*

## Activity 1

## Stakeholder Interviews (n = 50) – Interview Outline

### S.W.O.T. Analysis:

1. *What are the three greatest internal strengths across the Morehouse School of Medicine by mission area (Research, Clinical and Education)?*
2. *What are the three greatest internal weaknesses that must be addressed, by mission area?*
3. *What are the greatest opportunities, by mission area, for the School of Medicine?*
4. *What are the major external threats, by mission area, to the School of Medicine's future?*
5. *What is the current state of the Morehouse SOM's community engagement? Should it be changed/strengthened for the future?*

### Future Direction:

6. *What should the Morehouse School of Medicine look like in the next 5 – 10 years (i.e. what should the vision be)?*
7. *Describe three core values, or guiding principles, that will be important to the organization's future.*
8. *What, if any, organizational issues should be addressed in the strategic plan?*

### Strategic Priorities:

9. *Describe the three most important strategic priorities that must be addressed in this strategic plan.*

**Activity 2\***

## External Focus Groups

Three two-hour focus groups will be conducted with key external stakeholder groups in your community (e.g., foundations, United Way, neighborhood planning unit, etc.) to gather their input on:

- 1) The current strengths and weaknesses of the Morehouse School of Medicine;
- 2) Important issues to be addressed in the strategic plan; and
- 3) The greatest opportunities for the future.

*\*To be completed by in-house Morehouse team with guidance from AMC Strategies*

## Activity 3

## Stakeholder Survey

Upon completion of the Strategic Planning Interviews in Activity 1, an online survey tool will be used to test and validate the strategic priorities identified by interviewees that should be addressed in the strategic planning initiative. We will also solicit input on the core values important to the School's future and will allow open-ended suggestions on strategic issues to further inform the strategic planning initiative.

### Components of the Survey

General Demographics

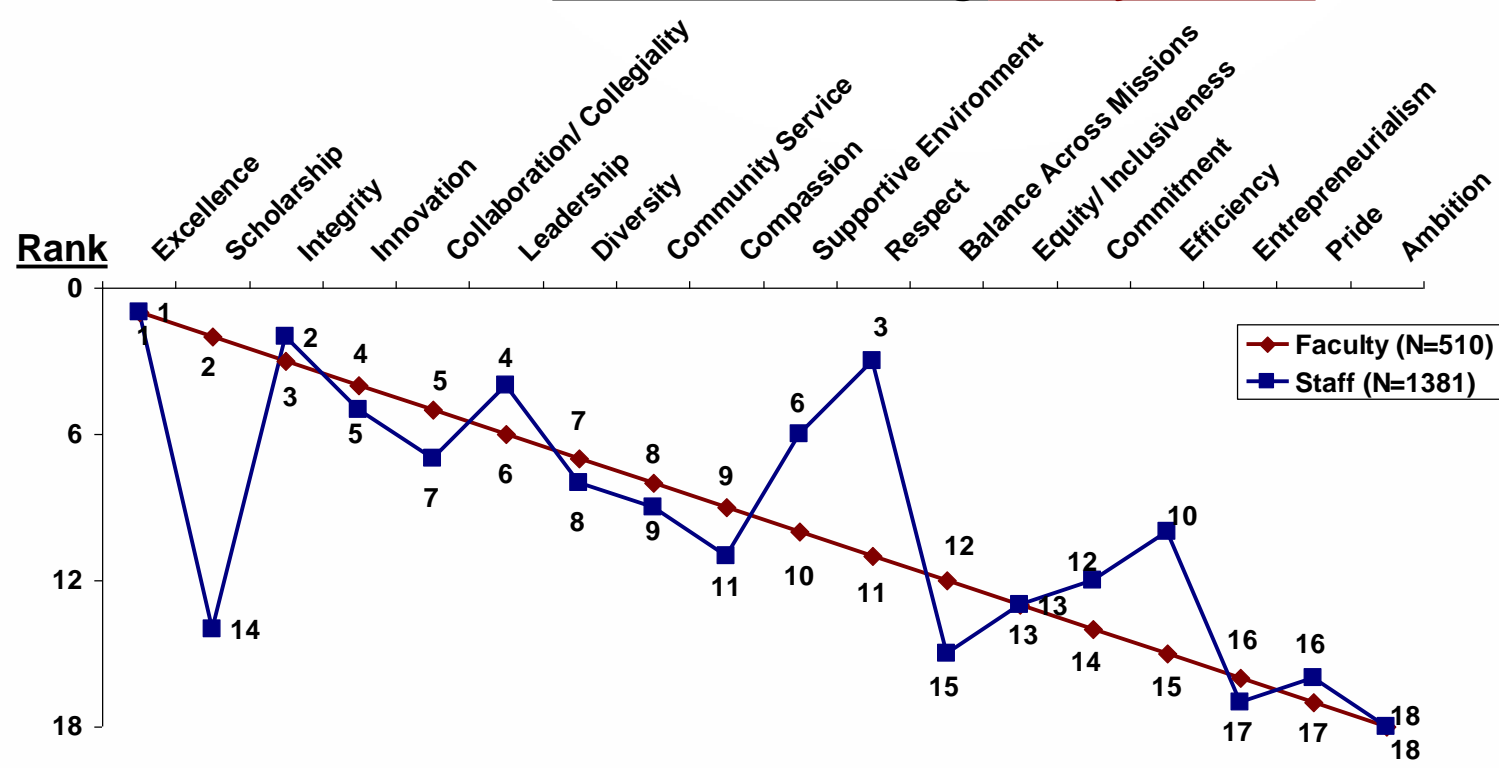
Input on Core Values

Strategic Priority Input

Open Question: What else should be addressed in the MSM strategic plan?

Activity 3 Survey Results...Driven from Results of the Planning Interviews

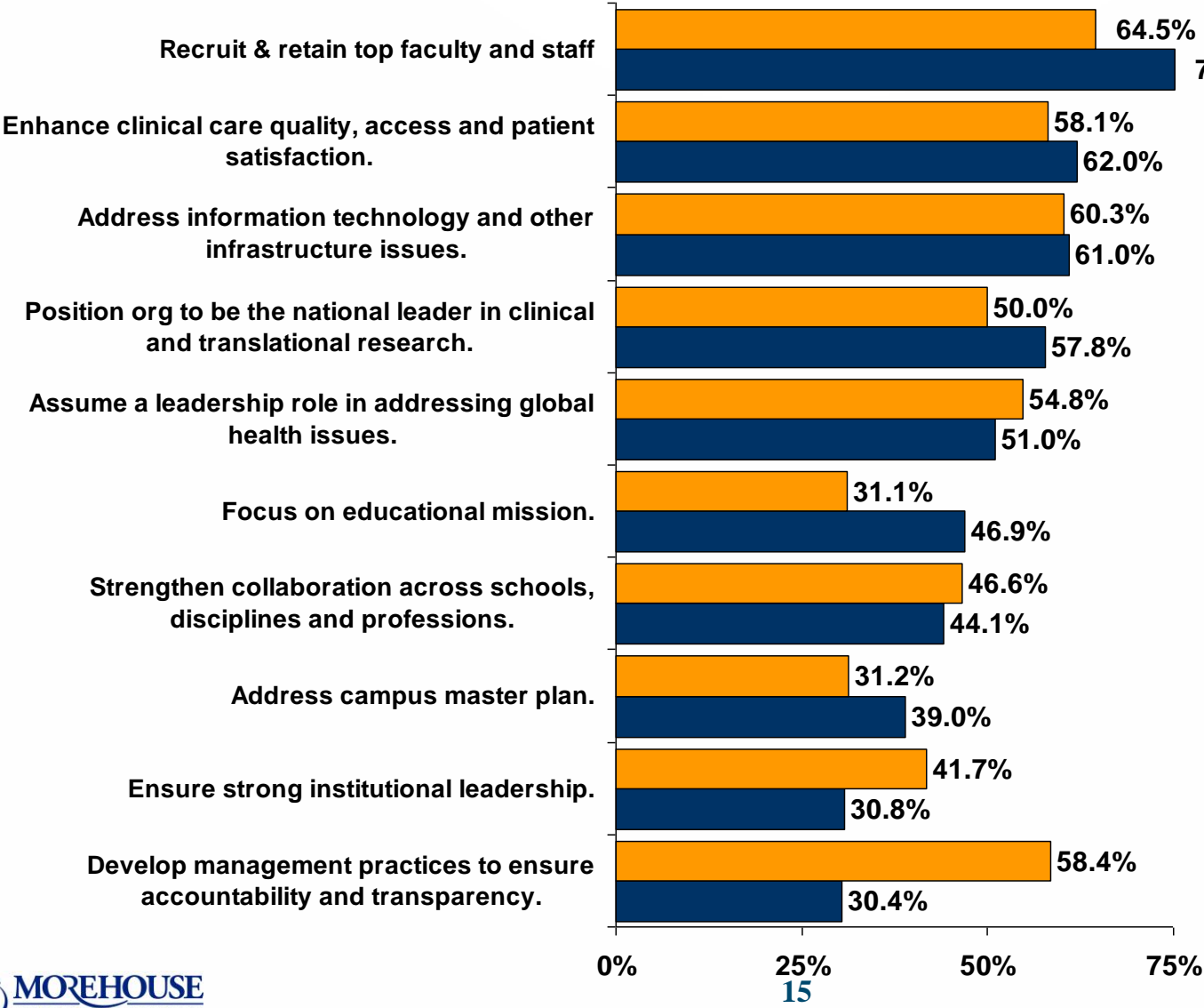
Core Values Ranking Faculty vs. Staff



Although staff and faculty rank many of the core values similarly, there are notable areas of divergence. Faculty consider scholarship the number two priority, while staff rank scholarship 14<sup>th</sup>. In contrast, staff rank respect 3<sup>rd</sup>, compared to a ranking of 11 among faculty. Staff also place a higher priority on supportive environment and efficiency than do faculty.

Activity 3 Survey Results

Top 5 Strategic Statements Faculty vs. Staff



- Faculty place greater emphasis on recruitment and retention, education, and clinical and translational research compared to staff
- Staff consider leadership and management practices to have greater priority.

Staff (N=1381)  
Faculty (N=510)

## Activity 4\*

## Environmental Assessment – Data and Trends Overview

### Clinical Services

- Service Area
- Patient Volume & Market Share
- Clinical Workload
- Financial Contribution
- Quality of Care

### Education

- Education and training profile
- Diversity of students and trainees
- How competitive are the educational programs?
- Financial Position

### Research

- Composition of Research Portfolio
- How Morehouse compares to its peers
- Intellectual property
- Factors affecting future of extramural research funding

### Resources

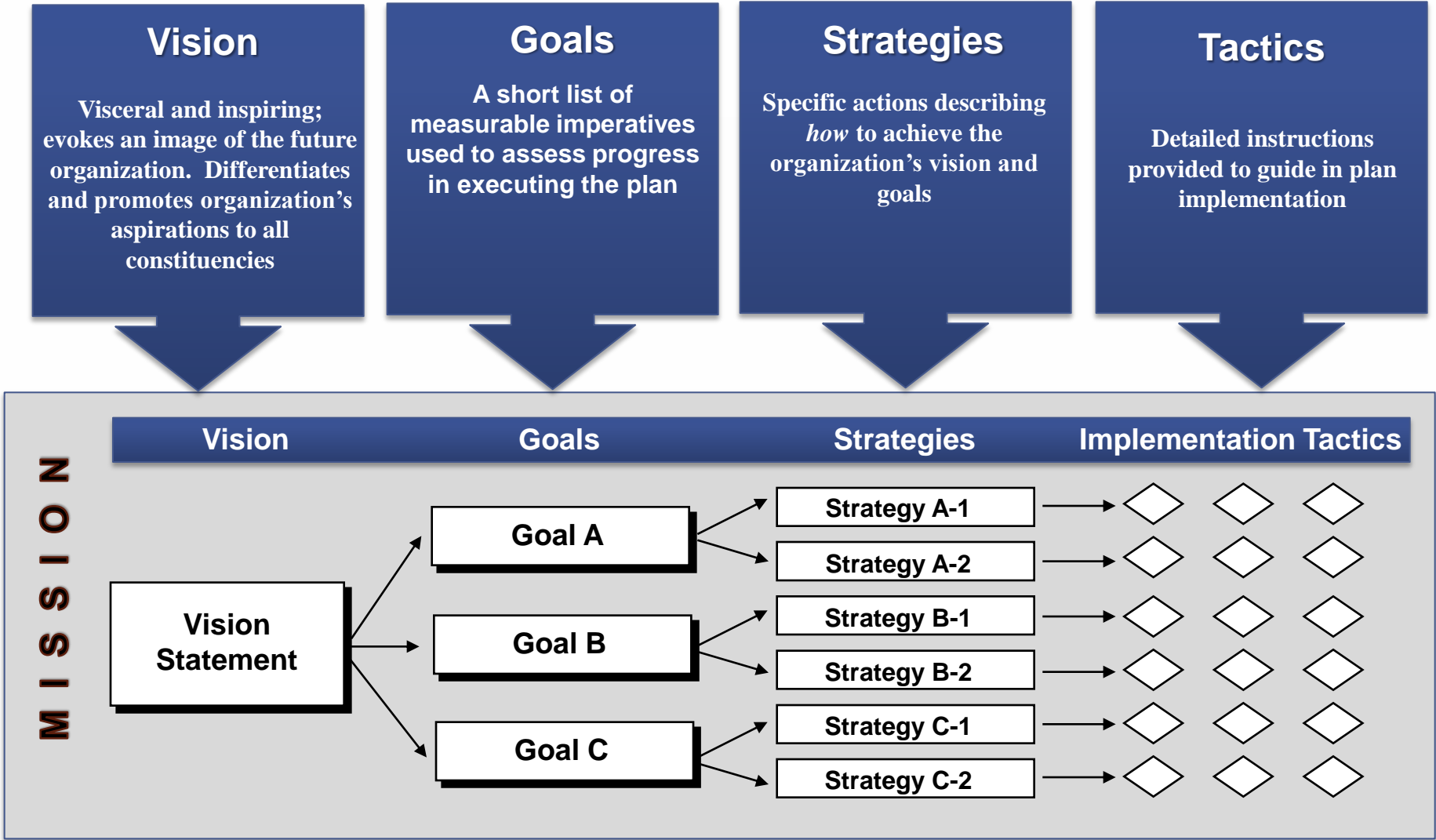
- Space
- Faculty FTE
- Staff
- Turnover/Vacancy Rates
- Employee Satisfaction
- Fundraising

*\*To be completed by in-house Morehouse team with guidance from AMC Strategies*



# STRATEGIC PLANNING PHASES TO FOLLOW

Each Phase of Our Process Develops the Plan's Strategic Framework



Phase III: Strategy Design Teams

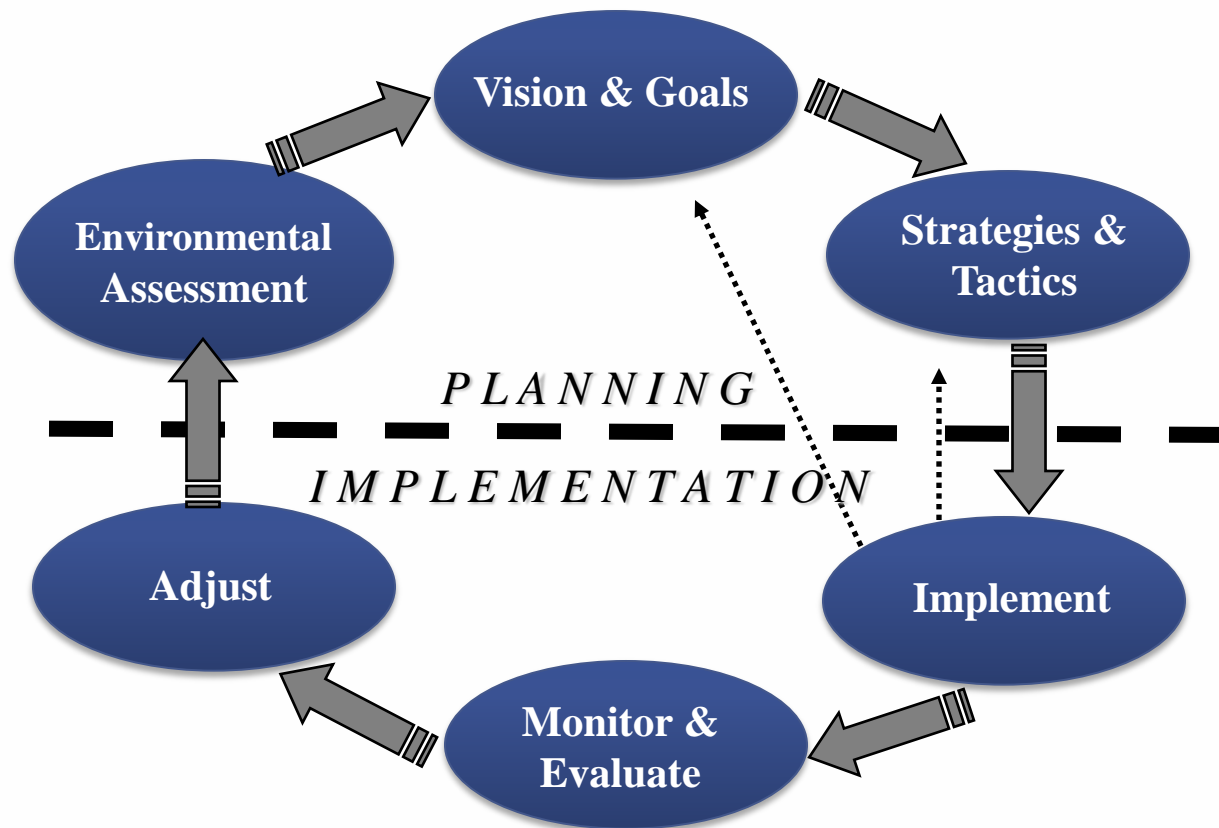


Phase III: Scheduling Monthly Strategy Sessions – Approach

	DAY 1 <i>(faciliated by AMC Strategies consultants)</i>	DAY 2 <i>(faciliated by AMC Strategies consultants)</i>
8:30 - 11:00 am	STRATEGY DESIGN TEAM - THEME 1	STRATEGY DESIGN TEAM - THEME 3
11 am - 1:30 pm	AMC Strategies - internal working session to summarize design team discussions	
1:30 - 4:00 pm	STRATEGY DESIGN TEAM - THEME 2	STRATEGIC PLANNING STEERING COMMITTEE MEETING - TEAM UPDATES AND DISCUSSION

## Phase IV: Implementation and Tracking Mechanisms are Key Outcomes

## ...Planning is an on-going, continuous process



- Successful execution is key
- Balance between strategic & operational pressures must be maintained
- Goals and strategies in the original strategic plan should be periodically assessed and adjusted to meet changing market conditions – to make the Plan a “living document”

# COMMUNICATION PLANNING

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## Strategic Plan Communications: Keys to a Successful Process & Outcome

### What / When to Communicate:

#### ***At Process Launch and/or During Process:***

- Strategic Planning Steering Committee Membership & Leadership's Charge to the Group
- Listing of Individuals on Teams; Interviewees; Others involved
- Strategic Planning Process Schedule/Time Line
- Highlights & Updates (e.g., Environmental Assessment; Interviews Summary; plan development)

#### ***At Plan Completion/Implementation Launch:***

- Final Outcome of Strategic Planning Process
- Institution's Mission & Vision Statement
- Institution's Values, Goals, & Strategies
- Strategic Plan Implementation Approach, Accountabilities, Timelines (varies by audience)
- Regular Updates on Progress

### Communication Vehicles

- Online (Website)
- Electronic Communication (email)
- Strategic Planning Steering Committee Meetings / Implementation Updates
- Design Team Meetings / Strategic Initiative Team Meetings
- Departmental Meetings
- Organizational Retreats
- Faculty/Staff/Student Meetings
- Town Hall Meetings / Updates
- Community Forums
- Newsletters/Announcements
- Publications/Postings

Strategic Communications – Key Throughout the Process

UCLA David Geffen School of Medicine



UCLA Health System

SCHOOL OF MEDICINE | HEALTH SYSTEM

STRATEGIC PLANNING INITIATIVE

Homepage Not logged in | Log In

- NEWS & EVENTS
- CALENDAR
- TIMELINES
- STEERING COMMITTEE
- PROCESS/OVERVIEW



Contact Us:

Office of the Dean  
(310) 825-6373

Joyce Fried, Director  
Strategic Planning  
Initiative  
(310) 794-1958

Welcome to the UCLA Strategic Planning for the Health Sciences Web site

For the next 13 months, the Strategic Planning Steering Committee will lead the creation of a five-year plan for our integrated organization, including our schools of medicine and nursing, our medical center and its hospital and clinics, and our faculty practice group.

In March 2010, the health system launched a strategic planning endeavor that will serve as a roadmap to the future. This Web site is aimed at fostering collaboration among all members of the health system community in developing the strategic plan. Please visit this site often for the latest information about the planning effort and to contribute your ideas.

News and Events

- A Message from the Steering Committee >
- The 2010 State of the Healthsciences Annual Address >

A Message from  
Dr. Eugene Washington  
Dean, David Geffen School of  
Medicine Vice Chancellor of  
Health Sciences at UCLA

I firmly believe that it's people that make great institutions. The question is not just, "How do we sustain our current level of excellence and achievement?" but "How do we elevate ourselves to the next level?" I will be spending



## AMC Strategies – Client Communications Website Examples

### Strategic Planning

- Strategic Planning
- Process and Updates
- Committee Members
- Calendar and Timeline
- Contact Us
- UC Davis Health System

SEND FEEDBACK

We want to hear from you. Use our feedback form to submit your comments.

CONTACT US




Vice Chancellor's Office  
UC Davis Health System  
(916) 734-2129

RELATED RESOURCES

2004 Strategic Plan (PDF)


UC DAVIS 2010 State of the Health System

## Strategic Planning



### A Bold Vision for a Bright Future

#### Message from the Chair




**Frederick Meyers, M.D., M.A.C.P.**  
Executive Associate Dean, School of Medicine  
Chair, Strategic Planning Steering Committee

Welcome to UC Davis Health System's strategic planning Web site. For the next 13 months, the [Strategic Planning Steering Committee](#) will lead the creation of a five-year plan for our integrated organization.

UC Davis Health System has a bold vision for a bright future — a future in which every one enjoys a healthy life. Every day, the people of UC Davis Health System work collaboratively and tirelessly to secure improved health for future generations. Together, UC Davis faculty, staff, students, volunteers, and community partners are shaping the future of science, nursing, medicine and health.

In February 2010, the health system launched a strategic planning endeavor that will serve as a roadmap to the future. This Web site is aimed at

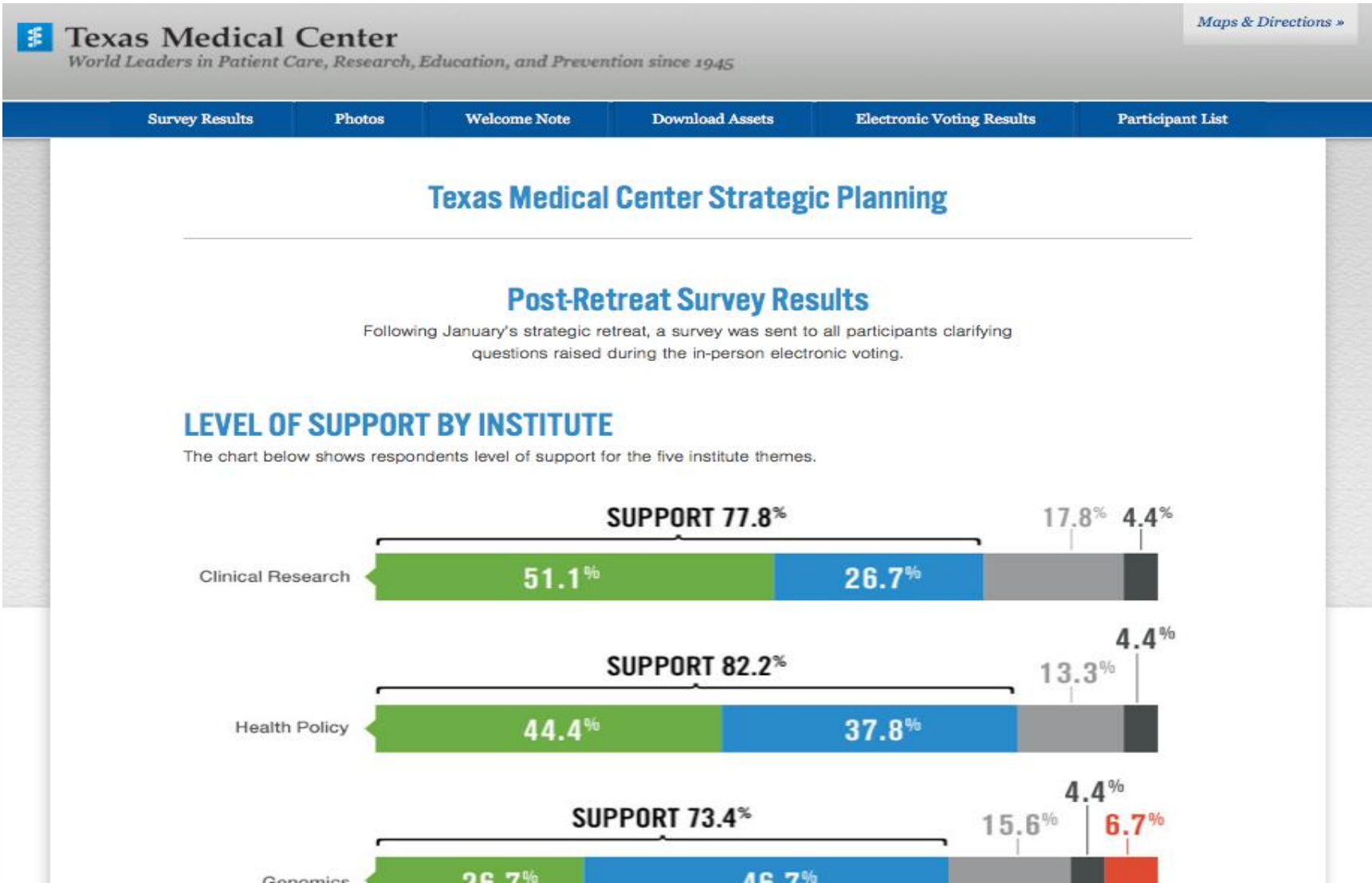
#### Vice Chancellor's Welcome



**Claire Pomeroy, M.D., M.B.A.**  
UC Davis Vice Chancellor,  
Human Health Sciences  
Dean, School of Medicine

An important key to success is having a plan and then turning that plan into action! Five years ago, our health system implemented an integrated strategic plan to guide our

AMC Strategies – Client Communications Website Examples



# AMC STRATEGIES: TEAM BIOS

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## AMC Strategies: Team Bios

**Diana Carmichael, Principal.** Diana is the founder and Principal of AMC Strategies, LLC, built upon 25 years of strategic planning experience. Prior to establishing AMC Strategies, Diana internally led strategic planning for Cedars-Sinai Health System in Los Angeles, and served as the Executive Director and founder of the Joint Office of Strategic Planning, a unique “joint” planning office between Barnes-Jewish Hospital and Washington University School of Medicine in St. Louis. Diana also served as the Assistant Dean for Strategic Planning at Washington University School of Medicine. Before focusing on academic health center strategic planning, Ms. Carmichael was a management consultant with the national healthcare strategy practice of PriceWaterhouse (now PricewaterhouseCoopers) followed by the healthcare strategy practice of Ernst & Young. She received her Bachelor of Science degree in Kinesiology from the University of California, Los Angeles and her Master of Hospital and Health Care Administration degree from the University of Minnesota in Minneapolis. Ms. Carmichael is a Past National Chair of the Group on Institutional Planning of the Association of American Medical Colleges (AAMC) and past President of the St. Louis Society for Healthcare Planning and Marketing. Diana is a national presenter on strategic planning in the academic setting at many AAMC Group on Institutional Planning meetings. Diana is a recipient of the prestigious “Distinguished Services Award” from the AAMC’s Group on Institutional Planning for *“outstanding service and commitment to the mission of the GIP and to the advancement of the practice of planning in academic medicine.”* She has been a frequent invited speaker on strategic planning topics at AAMC meetings and has been a keynote speaker on strategic planning for the Association of American Cancer Institutes/Cancer Center Administrators Forum, and an invited lecturer on strategic planning in the academic setting at Stanford University for their Physician/Faculty Leadership Development Program.

**Rebecka Levan, Senior Manager.** Becky has been with AMC Strategies since 2003, working on every major engagement across a broad client spectrum. She has significant experience in complex project management, strategic planning and financial analyses, and retreat facilitation. Ms. Levan brings a unique combination of experience in health care finance and health services research. As the Director of Health Economics and Outcomes Research at Zynx Health, she provided evidence-based medicine consultation to the pharmaceutical industry. While at the UCLA Center for Health Policy Research she managed population-based studies on access to health services as well as working on the California Hospital Outcomes Project. As the Director of Finance for Daniel Freeman Hospitals, she was responsible for reimbursement, budgeting, financial and market analysis. In addition to holding these positions, Becky has provided independent consultation in financial and statistical analysis, program design and evaluation, policy analysis, and grant writing for clients including UCLA Center for the Health of Children and Families, Cedars-Sinai Primary Care Pediatrics, RAND, Los Angeles County Department of Health Services, Tenet Corporation, Charles Drew University, and the Healthcare Association of Southern California. Rebecka received her MPH from the University of California, Los Angeles and has a degree in economics from the University of California, Berkeley.

### AMC Strategies: Team Bios

**Laura Fidler, Senior Manager.** Laura brings 24 years of experience in academic health care strategic planning and facilities master planning to the AMC Strategies team. As Senior Vice President and Assistant Dean for Strategic Planning at the University of Cincinnati Medical Center, she led the strategic planning activities that resulted in doubling of research funding, creation of satellite campus, mergers and acquisitions, and the establishment of a new health professional college and programs. She has managed medical center and university economic impact studies, and developed and implemented a 10-year facility master plan leading to the construction and occupancy of three new research buildings and the renovation of over 1 million square feet of medical center space. She has extensive management and technical experience in research, education and clinical space allocation and utilization. As senior vice president she was also responsible for the public relations, government relations and crisis protocol for the medical center. She has the ability to work effectively with a diverse group of people at all organizational levels. Laura is a past Program Chair of the Group on Institutional Planning of the AAMC and received her MPH from the University of Michigan. The University of Cincinnati CARE/Crawley Building was awarded the Chicago Athenaeum Museum of Architecture and Design American Awards 2009 which was overseen by Laura. Laura joined AMC Strategies in 2010.

**Andrea Helft, Manager.** Before joining AMC Strategies in 2013, Andrea Helft honed her exceptional, customer-focused consulting skills at other top consultancies including Booz, Allen & Hamilton, The Lewin Group and Hammes Company. In-house positions in strategic planning and operations, which include Stanford Hospital and Clinics and Kaiser Permanente, provided Andrea with invaluable experience working "in the trenches" with leading healthcare executives. Andrea's expertise ranges from strategic planning and business analysis, program and business model development, marketing and project management. Andrea received her MA in healthcare policy from the Johns Hopkins University and her MBA from the Marshall School of Business at the University of Southern California. She holds a BA (magna cum laude) in Political Science and Environmental Science from the University of Colorado at Boulder.

In addition to the talents of the primary team members proposed above, AMC Strategies will be supported throughout the course of this engagement by **Kendall Leeper Bassford, Staff Associate/Analyst.** Kendall has been with AMC Strategies since 2001.