Strategic Planning:

Making Sense of Where We Were, Where We Are & Where We Are Going

October 18, 2018
Faculty Council
What does Star Trek have to do with Strategic Planning?
The Beginning of our 1-year Plans

TCMC
Strategic Planning
2015 – 2016

Geisinger Commonwealth School of Medicine
3 Parts of Planning & Organizational Capacity Building

All inclusive, comprehensive Strategic Planning

1. Operational & Strategic Planning
   - Office, Department & Divisional Planning
   - Support VPs in development of SWOT, key performance indicators, and assessment
   - Institutional Effectiveness – complete the rubric annually

2. Strategic Initiatives – Cross divisional teams
   - Initiatives generated through discussion and endorsed by President’s Cabinet

3. Professional Development – use planning as an educational platform in GCSOM Leadership Development Program (idea in development)
   - Get involved, take ownership, share purpose
   - Enhance leadership, followership, organizational and communication skills
   - Understand the industries we straddle healthcare, insurance and higher education (teaching & research)
Definition of Terms

• Mission a statement defining an organization’s function...why it exists...its reason for being

• Philosophy (or Purpose at Geisinger) – our guidepost for how and why we do things

• Values (or Pillars at Geisinger) – our principles and standards; the characteristics that matter most

• Vision (or strategic intent) – a detailed description of a desired future

• Strategy our plan for operation - - - how we will get there (Strategy Diamond)

• Tactics short-term “moves” and actions that lead to progress toward results (sometimes referred to as strategic initiatives)

• Goals statements of outcomes that are specific, measurable, actionable, realistic, timely: stepping stones to a vision (KPI’s)

• Milestones achieved upon completion of several related goals; marker of achievement and progress

Geisinger Commonwealth School of Medicine
Mission – GCSOM

Geisinger Commonwealth School of Medicine educates aspiring physicians and scientists to serve society using a community-based, patient-centered, interprofessional and evidence-based model of education that is committed to inclusion, promotes discovery and uses innovative techniques.

✓ MISSION is a sentence defining an organization’s function...why it exists...its reason for being.

✓ Does our mission statement need to evolve?
Purpose – Geisinger System

Everything we do is about caring for our patients, our members, our students, our Geisinger family and our communities.

Founded more than 100 years ago by Abigail Geisinger for her central Pennsylvania community, Geisinger has expanded and evolved to meet regional needs and has developed innovative, national programs in the process.
What is the Action Related to Our Mission Statement

We
Educate
the Healthcare Workforce and Teams
of
the Future.
Vision
…or Strategic Intent
(an evolution and work in progress…)

Leveraging the strengths of Geisinger in genomics, informatics and population health…

We will develop the educational programs and learning venues that
Are regionally engaged and nationally relevant models for the future of healthcare education and community wellbeing
• **Learning** – We share our knowledge with the best and the brightest to better prepare the caregivers for tomorrow.

• **Innovation** – We constantly seek new and better ways to care for our patients, our members, our students, our communities and the nation.

• **Kindness** – We strive to treat everyone as we would hope to be treated ourselves.

• **Excellence** – We treasure our colleagues who humbly strive for excellence.
Where are We Now?
TCMC Start-Up Mode

- Founding of the school
- Recruiting founding Team
- Degree Development
- Construction

Transitions & Operational Stability

- Securing accreditation
- Structures & repeatability – building institutional capacity
- Expanding program size
- Students coming home?
- Preparing for Change – Integration as a Process

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3. Leveraging Geisinger Strengths
   - Expanding institutional partnerships
   - Creating the future of healthcare, the healthcare workforce and the teams

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Strategic Planning: 3+ – Year View

2015 – 2016
Year of Alignment

- Transition to 1-year planning cycles
- Alignment of planning activities: budget, employee review, goals
- Cabinet shared goals
- State of College bound and presented
- Risk Assessment - PwC
- 1st Planning Retreat with Grigsby (AAMC)

2016 – 2017
Year of Structure

- Strategy Rubric
- OIRPE Created
- KPI’s 1st Draft
- CMA outlined
- Institutional Effectiveness Rubric
- SWOT Analysis
- Risk Assessment - PwC
- Ongoing support and coaching with Grigsby

2017 – 2018
A Year of Change

- Integration to Geisinger
- Continuation of 1-year plans
- Begin adoption of Geisinger processes
- Solutions Committee
- Ongoing support and coaching with Grigsby

2018 – 2019
A Year of Formation

- Continued transition to Geisinger systems
- Alignment to Geisinger System Planning timeline and template
- Creation of GCSOM 3-year plan
- Ongoing support and coaching with Grigsby

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Milestones: 3+ – Year View

2015 – 2016  
Year of Alignment

Update report submitted to MSCHE  
Partners explored; CIN ruled out  
Guthrie Campus  
65M Econ Impact  
WB Office at King’s-on-the-Square  
Launch of Campaign for Scholarships & Innovation

2016 – 2017  
Year of Structure

CSI goal of 15M eclipsed (summer ‘16)  
$5M Halpin Gift  
Doylestown Campus (April ‘16)  
BHI funding secured  
Establishment of Graduate School (1/17)

2017 – 2018  
A Year of Change

Integration to Geisinger  
CSI second goal ($20M) eclipsed  
Transition to Geisinger Clinical Learning Venues  
Assume Leadership of GME  
MD alums return  
COE secured  
Surplus Budget

2018 – 2019  
A Year of Formation

MD curricular renewal  
Long-term contract with Guthrie  
(Anticipated) MSB/4th-floor renovations  
Anticipated launch of AtlantiCare campus  
Anticipated launch of PSMP

Points of Pride: From TCMC to GCSOM

Geisinger Commonwealth School of Medicine
We’re not in Kansas anymore…
Industry Integration & Value Creation

- Care Delivery
- Health Insurance
- Higher Education & Research

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It’s all about the **context** by which we address problems (ormesses). The complexity of thechallenges addressed byGeisinger cannot be solved byasingle industry.
Our process - planning calendar summary

**Phase:** Purpose & Strategy Setting

- **Purpose and strategy statement**
  - What are we trying to accomplish?
  - Where are we going?

**Output:**

- **Major Activity (Timing):** CEO & ELT Strategic Direction Setting Session *(June/July 2018)*

**Support:**

- **Accountable:** CEO, ELT
- **Strategy, Corporate Communications**

**Major Activity (Timing):** Document preparation, synthesis, distribution *(June/July)*

**Support:**

- **Accountable:** CSO
- **Strategy, Corp Comm, Finance, AE, Quality, KACO, Pop Health, GHP sales, GHP market research, GHP PMM, HR, Patient Experience, Government Relations, GCSOM, Research

**Major Activity (Timing):** Enterprise Strategic Planning Retreat *(July/August)*

**Support:**

- **Accountable:** CEO, ELT, CEO Council, Health Plan, Regional, Institute, Research, Education, Quality, Pt. Exp., HR leadership
- **Strategy, Corporate Communications, Finance**

**Major Activity (Timing):** Strategy cascade kick-off @ SLF *(Oct)*

**Support:**

- **Accountable:** CEO/ELT, System Leadership Forum
- **Strategy, Corporate Communications, Finance**

**Plan Cascade:**

- **Health Plan, CE (Institute & Region), Research, Education strategic plans**
- **Goals cascade**
- **Strategic tactics**
- **LRFM + capital plan (detail)**

**Strategic Plan Development:**

- **Enterprise level strategic plan**
  - Strategic priorities
  - Strategic objectives
  - Goals
  - Strategic initiatives
  - LRFM + capital plan (high-level)

**Strategy Execution:**

- **Business Planning Process approval and implementation**
- **Integration with LRFM**
- **Quarterly status reporting and communications**

**Direction:**

- **Business Analysis**
  - Strategic Environmental Analysis
  - Enterprise focus, regional view
  - Major forces / themes
  - Recommendations for improvement, growth, integration

**Deployment:**

- **Discipline**
  - Health Plan, CE (Institute & Region), Research, Education strategic plans
  - Goals cascade
  - Strategic tactics
  - LRFM + capital plan (detail)

**Geisinger Commonwealth School of Medicine**
Our Planning Tools: 
And Why We Have Them...
GCSOM
Presidential Goals
So Now What Do We Do?
The Strategy Diamond

Don Hambrick, PhD
Columbia University & Penn State University

Arenas: Where will we be active (and with how much emphasis)?
- Which product categories?
- Which channels?
- Which market segments?
- Which geographic areas?
- Which core technologies?
- Which value-creation stages?

Vehicles: How will we get there?
- Internal development?
- Joint ventures?
- Licensing/franchising?
- Alliances?
- Acquisitions?

Economic Logic: How will returns be obtained?
- Lowest costs through scale advantages?
- Lowest costs through scope and replication advantages?
- Premium prices due to unmatchable service?
- Premium prices due to proprietary product features?

Differentiations: How will we win?
- Image?
- Customization?
- Price?
- Styling?
- Product reliability?
- Speed to market?

Staging: What will be our speed and sequence of moves?
- Speed of expansion?
- Sequence of initiatives?
SWOT
strengths, weaknesses, opportunities, threats
Goal: Coordinate all activities on the fiscal calendar

Alignment Process – 2016
### DIVISIONAL PLANS FY 2017 - Academic Affairs

Institutional Effectiveness Self-Assessment –

(adapted from the Institutional Effectiveness Rubric by the SUNY Council on Assessment and King’s College)

(1=Emerging; 2=Proficient; 3=Excelling)

<table>
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<tr>
<th>Element</th>
<th>Evidence</th>
<th>Goals 1 Maintain LCME approval status</th>
<th>Complete Academic/Clinical Affairs restructuring</th>
<th>Prepare Students from USMLE Step 1</th>
<th>Expand and oversee TCMC’s degree programs</th>
<th>Define TCMC student core and unique attributes</th>
<th>Expand interprofessional education/Explore grants for IPE innovation</th>
<th>Integrate Geisinger HC System in TCMC education</th>
<th>Define direction of research investigation and education</th>
<th>Collaborate with The Wright Center for residency in Psychiatry</th>
<th>Advance TCMC reputation nationally</th>
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**Key Performance Indicators/Outcomes – What data will you collect?**

**Plan – Are there operational items in place to support the goal?**
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Now What?
We will build upon what we are already doing

**Strategic Initiatives**

1. MD Curricular Renewal (Iobst)
2. Optimize Clinical Learning Venues (Iobst)
3. GME Expansion  (Thompson, S. Jenkins, J. Arenyevictz, S. McIntyre, M. Paglia)
4. New Graduate Degrees (Koerwer, Shanower, Arnott, Boardman, Sutzko, Schmude, Levy)
5. Diversify Healthcare Workforce (Castro, Murtha, Gaofalo, S. Akhondi, Schmude))
6. Alleviate Student Debt (Noon, Schmude, McNamara, Ellis, King, Castro, Garofalo, Baumes)
7. Student, Faculty and Staff Wellbeing (Scheinman, Adonizio, DiMattia, Jenkins, Osif, Padden, Arnott, Gillott)
8. Community Health Equity (Castro, Mulrine, Huey, Sutzko, Lacayo, Joyce)
9. Alumni Engagement (Garofalo, Cernera, Loughran MD’18, Nichols, Davis, others to be added)
10. Expand Educational Partnerships & Programming (Koerwer, Perneta, noon, Sutzko, Boardman, Evanick)
EPCOT
What are we building – the future