UVA SOM Retreat

March 7, 2014
## Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 − 8:15</td>
<td>Welcome / Introduction</td>
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<tr>
<td>8:15 − 9:45</td>
<td>Visioning Table Discussion → Strengths &amp; Weaknesses</td>
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<tr>
<td>9:45 − 10:00</td>
<td>Break</td>
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<tr>
<td>10:00 − 11:30</td>
<td>5 Forces Table Discussion → Opportunities &amp; Threats</td>
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<tr>
<td>11:30 − 12:00</td>
<td>Integrating Case: Library</td>
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<tr>
<td>12:00 − 1:00</td>
<td>Lunch</td>
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<tr>
<td>1:00 − 2:00</td>
<td>Live Polling &amp; Discussion – Defining Our Starting Point</td>
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<tr>
<td>2:00 − 2:30</td>
<td>VIVO – Demonstrating a potential tool</td>
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<tr>
<td>2:30 − 2:45</td>
<td>Break</td>
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<tr>
<td>2:45 − 3:45</td>
<td>Process Orientation</td>
</tr>
<tr>
<td>3:45 − 4:00</td>
<td>Wrap-Up / Next Steps</td>
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</table>
Start Pushing the Flywheel

• Affirm Mission and Values
• Declare Vision
• Assess Current State
• Identify Customer(s)
• Assess External Conditions
• Plan – Do – Check – Adjust
• Repeat
Jim Collins: Student of Great Organizations

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Questions We Must Answer

- What does the future look like?
- How does that distinguish us?
- How does that help us compete?
- How will it engage our faculty and staff?
Establishing a “Picture of the Future”

Collins: “Greatness is not a function of circumstance. Greatness, it turns out, is largely a matter of conscious choice, and discipline.”
Visioning Exercise – Instructions

• Take 3 – 5 minutes to collect your thoughts and complete your own worksheet
• Spend ~15 minutes discussing the three questions at your table
• Compile the three most compelling ideas in response to each question for report out to the group
• Hand your personal worksheet to the facilitator at the end of the exercise (no name needed)
## Visioning

<table>
<thead>
<tr>
<th>Question</th>
<th>Your Thoughts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. What are we most passionate about?</td>
<td></td>
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<tr>
<td>2. At what are/can we be the very best?</td>
<td></td>
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<tr>
<td>3. What will drive our economic or resource engine?</td>
<td></td>
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</tbody>
</table>
Group discussion: What would it take to build on / capture our strengths?
Break
Michael Porter: The Five Competitive Forces That Shape Strategy

1. Threat of Substitutes
2. Bargaining Power of Suppliers
3. Rivalry Among Established Firms
4. Risk of Entry
5. Bargaining Power of Buyers

Factors:
- Political/Legal
- Economic
- Social
- Technological
# Five Forces

<table>
<thead>
<tr>
<th>Force</th>
<th>Example</th>
<th>Your Thoughts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Rivalry Among Established Firms</td>
<td>• Duke</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Vanderbilt</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• VCU</td>
<td></td>
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<tr>
<td>2. Threat of Substitutes</td>
<td>• MOOCs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Osteopathic Schools</td>
<td></td>
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<tr>
<td></td>
<td>• Pharma / Biotech</td>
<td></td>
</tr>
<tr>
<td>3. Bargaining Power of Suppliers</td>
<td>• Faculty</td>
<td></td>
</tr>
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<td></td>
<td>• Residents</td>
<td></td>
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<tr>
<td></td>
<td>• Post-Docs</td>
<td></td>
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<tr>
<td>4. Risk of Entry</td>
<td>• New SOMs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• New Residency / Graduate programs</td>
<td></td>
</tr>
<tr>
<td>5. Bargaining Power of Buyers</td>
<td>• Funding Organizations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Patients</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Students</td>
<td></td>
</tr>
</tbody>
</table>
Five Forces Exercise – Instructions

• Take 3 – 5 minutes to collect your thoughts and complete your own worksheet
• Spend ~15 minutes discussing the Five Forces at your table
• Compile the three most compelling ideas in response to each force for report out to the group
• Hand your worksheet to the facilitator at the end of the exercise (no name needed)
What will it take to get there?
INTEGRATING CASE – LIBRARY
## Library Case Study – Visioning

<table>
<thead>
<tr>
<th>Question</th>
<th>Your Thoughts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. What are we most passionate about?</td>
<td>Linking our “clients” – UVA SOM / Health Affairs colleagues – with knowledge and expertise that supports their missions, regardless of media or physical characteristics of the Library or client</td>
</tr>
<tr>
<td>2. At what are/can we be the very best?</td>
<td>Creating, finding and disseminating knowledge across all missions as 24/7 connectors who are highly flexible in delivering on passion</td>
</tr>
</tbody>
</table>
| 3. What will drive our economic or resource engine?                      | *Time savings for revenue generating colleagues*  
  *Improved decision making in the care environment (evidence for impact on care)* |
# Library Case Study – Five Forces

<table>
<thead>
<tr>
<th>Force</th>
<th>Example</th>
<th>Your Thoughts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Rivalry Among Established Firms</td>
<td>• Other libraries / knowledge resources, especially around C’ville</td>
<td>• Library expertise as part of care stream, not just for self-directed access (e.g., patients learning on own about dx)</td>
</tr>
<tr>
<td>2. Threat of Substitutes</td>
<td>• Google Scholar • IBM Watson</td>
<td>• Be expert in meta data and ontology • Library expertise taken for granted as search technology becomes easier and less esoteric</td>
</tr>
<tr>
<td>3. Bargaining Power of Suppliers</td>
<td>• Publishers • Specialty knowledge resources</td>
<td>• Cost per title / license is higher for virtual resources • Explosion of resources (3,000 to 30,000 journals in less than a generation)</td>
</tr>
<tr>
<td>4. Risk of Entry</td>
<td>• Direct-to-Consumer research service • Distant, virtual resources</td>
<td>• Make proximity and easy of use unbeatable • Close alignment with UVA users</td>
</tr>
<tr>
<td>5. Bargaining Power of Buyers</td>
<td>• Researchers • Clinicians • Students</td>
<td>• Embed expertise in all missions • Be center for collaborative efforts</td>
</tr>
</tbody>
</table>
## Library Case Study - SWOT

### Strengths
- Strong service ethic
- Resource to all SOM and Health Affairs / “a neutral resource” to all
- Sense of urgency in response to changing environment
- Space and location

### Weaknesses
- Needed skills are changing
- Library culture can be risk averse / rule based
- Tendency to define in terms of square feet (the library’s physical space) rather than domain of knowledge management

### Opportunities
- Recognition as center of knowledge access, regardless of media
- Role in new fields (e.g., Big Data)
- Space to facilitate collaboration and interdisciplinary teaching / learning
- Embedded librarian / knowledge management expertise

### Threats
- “Everything on the web is free”
- “What value is library expertise when you have Google Scholar / IBM’s Watson?”
- Non-revenue generating
- Space is a target for non-library uses
Lunch discussion question
  – Major gift
  – To be spent in three years
  – Needs to touch three distinct areas (not fewer)
  – Only 10% for capital facilities/equipment

What would you do and why?

Note: The table will give a two-minute pitch of the best idea to the steering committee at the end of lunch
DEFINING OUR STARTING POINT
Statement 1:
At UVA SOM, we solve problems collaboratively

A. Strongly Agree
B. Somewhat Agree
C. Somewhat Disagree
D. Strongly Disagree
Statement 2: We communicate openly, honestly & effectively

A. Strongly Agree
B. Somewhat Agree
C. Somewhat Disagree
D. Strongly Disagree

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Statement 3:
Cross-grounds collaboration is crucial to our future

A. Strongly Agree
B. Somewhat Agree
C. Somewhat Disagree
D. Strongly Disagree

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Statement 4
Our strategic direction as a school is unclear to me

A. Strongly Agree
B. Somewhat Agree
C. Somewhat Disagree
D. Strongly Disagree

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Statement 5
I understand the planning process

A. Strongly Agree
B. Somewhat Agree
C. Somewhat Disagree
D. Strongly Disagree

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Statement 6
I feel engaged in the planning process

A. Strongly Agree
B. Somewhat Agree
C. Somewhat Disagree
D. Strongly Disagree

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Statement 7
I do not understand the tools, information and other resources available for planning effectively

A. Strongly Agree
B. Somewhat Agree
C. Somewhat Disagree
D. Strongly Disagree

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Statement 8
I do not have the ability to affect change

A. Strongly Agree
B. Somewhat Agree
C. Somewhat Disagree
D. Strongly Disagree

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Statement 9
Failure is okay as long as we learn from it

A. Strongly Agree
B. Somewhat Agree
C. Somewhat Disagree
D. Strongly Disagree

63% Strongly Agree
21% Somewhat Agree
13% Somewhat Disagree
4% Strongly Disagree
Process Orientation

• Roles and Responsibilities Of Individuals
  – Messaging is our collective responsibility
  – Words matter, but error is inevitable
    • Our aim is shared to “do this right”
    • Express concerns and suggest improvements for clarity
  – Silence means assent
  – Half-baked ideas are welcome
## Process Orientation

### • Roles and Responsibilities Of Groups

<table>
<thead>
<tr>
<th>Group</th>
<th>(# involved)</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Committee</td>
<td>(6)</td>
<td>Endorse proposed strategic initiatives and allocate resources to best advance the School of Medicine.</td>
</tr>
<tr>
<td>Steering Committee</td>
<td>(17)</td>
<td>Recommend a future vision and set of strategic initiatives designed to achieve the vision by refining and endorsing Mission group findings and commissioning Tactical group assignments.</td>
</tr>
<tr>
<td>Mission Work Groups</td>
<td>(82)</td>
<td>Identify strengths and refine plans, in each mission, to augment concretely in near term (by end of 2014) with iteration to follow over long term.</td>
</tr>
<tr>
<td>Tactical Work Groups</td>
<td>(113)</td>
<td>Establish cross-cutting threads to foster cross-grounds advances in infrastructure – soft and hard – including as commissioned by the Steering Committee.</td>
</tr>
<tr>
<td>SOM Faculty and Staff</td>
<td>(2,500)</td>
<td>Engage in planning process with an eye toward practical implementation.</td>
</tr>
<tr>
<td>Planning Support Team</td>
<td>(6+)</td>
<td>Facilitate with strategic planning expertise, data collection and logistics, process documentation, refinement, responsiveness, and experience-based recommendations.</td>
</tr>
<tr>
<td>Chairs, Departments, Centers</td>
<td></td>
<td>Dedicate portion of standing work flow to planning process</td>
</tr>
</tbody>
</table>

**UVA SOM Strategic Planning Retreat – March 7, 2014**
Process Orientation
Steering Committee

• Charge:
  – Recommend an integrated future vision and set of prioritized strategic initiatives to the Executive Committee designed to achieve the visions

• Assignment:
  – Ensure enterprise view
  – Refine and endorse across all work group initiatives, where necessary returning for further iteration or commissioning new work
  – Integrate recommended initiatives into a coherent plan
Process Orientation
Mission Work Groups

• Charge:
  – For each mission (Research, Education and Academic Clinical Practice) identify strengths and refine initiatives in specific areas to achieve the vision in an iterative process

• Assignment:
  – Develop list of concrete initiatives to achieve vision
  – Recommend three priorities to begin immediately for steering committee consideration
  – Assume other initiative recommendations will follow
Process Orientation

Tactical Groups

• Charge:
  – Establish cross-cutting threads that foster advances in infrastructure across-grounds, and within the school

• Assignment:
  – Develop implementable plans for solving already identified problems
  – Support Mission Work Groups as they commission Tactical Group planning efforts to address area-specific issues; iterate to resolution
Process Orientation

• What can we do to increase communication, engagement and optimism around the process?

• What can we do to increase the likelihood of successful implementation of the strategic plan?
NEXT STEPS AND WRAP UP
Next Steps – Calendar Overview

• Mission Work Groups
  – Kick off next week by 3/14/14
  – Report to Steering Committee by 3/31/14 on:
    • Do we understand the SWOT for each mission group?
  – Report to Steering Committee by 4/30/14 on:
    • What is the desired future state of this mission area and how will we get there? (i.e., list of three initiatives)

• Tactical Work Groups
  – Some already working; those not already meeting kick off next week

• Steering Committee
  – Develop Enterprise SWOT by end of April
  – Review initial list of recommended initiatives by end of May
  – Develop plan to recommend to Exec Comm by end of June
Wrap-Up Questions

• How will you define success?
  – What is the evidence you’ll be looking for in the next 3-6 months, 18-24 months that will give you confidence that this is working?
Wrap-Up Questions

• Who had an “ah-ha” that you want to report on?
Wrap-Up Questions

• What is the story you will tell people who weren’t here?