

strategic planning

News of the UMass Medical School Strategic Planning Process

UMMS and UMass Memorial launch joint strategic planning process

After several months of meetings and extensive exploration, UMass Medical School and UMass Memorial Health Care recently announced a decision to develop a joint strategic plan. A retreat was held in October, attended by 40 senior administrators and academic leaders from both the clinical system and the Medical School, to discuss the core values of both entities, gain a broader understanding of the challenges and opportunities that face our respective organizations and create a framework for the development of a strategic plan for an academic health center enterprise. Participants talked about current issues, potential barriers and potential solutions.

The retreat revealed a prevailing spirit of cooperation and a great deal of passion and enthusiasm on the part of the participants for coming together to plan the future. The strategic planning process will address the following needs: more cohesive and collaborative

processes that bring together the various entities from UMMS and UMass Memorial and the basic science and clinical faculty; and the creation of an enterprise-level plan. What came out of the retreat was a commitment to work as a joint enterprise—a true academic

health sciences center.

The plan will be shaped through collaboration and inclusion and will look beyond the formal boundaries of UMMS and UMass Memorial as well as address the differences among the various parts of the organizations. In this issue of *Focus on the Strategic Planning Process*, you will learn about how the plan will be developed and how the teams will call together members of the UMMS–UMass Memorial community to work on building our future together. ■

Message from Terence R. Flotte and Walter H. Ettinger Jr.

Strategic Planning Task Force co-chairs



Walter Ettinger, MD, MBA, and Terence Flotte, MD, are leading the Strategic Planning Task Force.

We are pleased to jointly chair the 29-member Strategic Planning Task Force comprising a broad group of leaders from both communities that will work throughout this academic year to develop an extensive strategic plan for charting our ambitious collective future. Senior Vice President for the Health Sciences and Interim Chancellor Michael F. Collins and UMass Memorial President and CEO John G. O'Brien will be active participants and will work together to encourage the planning effort in the months ahead.

Moving forward, the Strategic Planning Task Force will establish goals for the planning effort, coordinate the efforts of the work groups, and identify and allocate resources to support the planning effort. We have set an aggressive agenda in regard to work plans and

timeframes, with the goal of having a final report by May 15, 2008. To meet our timeline, we have established six work groups, to concentrate on areas identified as critical for our future success. (See back for details.) The work groups will create interim reports by

February to be reviewed by the task force and campus constituencies.

When the task force had its first meeting in November, the work group co-chairs were asked to convene their teams as soon as possible to assess the charges provided by the retreat participants. Work group leaders will be reaching out to members of the UMMS–UMass Memorial community to encourage their participation.

We are committed to communicating information related to the strategic planning process over the coming months. To that end, we have created a Web site that provides easy access to anyone interested in the strategic planning effort and the deliberations of the task force and its work groups. We will announce shortly how members of the community can access the site and interact online with members of the task force and its work groups.

The success of our planning effort depends on the involvement of the members of our academic health center community—we encourage your active participation. ■

Letter to our communities—

Over the course of the last several months, we have been engaged in conversation with senior leaders from both UMass Memorial Health Care and UMass Medical School about what it would take to become one of the nation's premier academic health centers. All of us agree we must continue to focus on our missions of excellence in health care, education, research and public service and that we must undertake joint planning efforts that look across our collective missions.

Understanding that our paths to a nationally recognized academic health center are fundamentally connected, it is with shared excitement that we, in partnership with the senior leaders from both institutions, have begun a joint strategic planning effort.

Over the coming months, you will hear more about our cooperative planning efforts and the activities that are in process across our enterprise.

Together, we look forward to charting our ambitious future.

Michael F. Collins, MD
Senior Vice President for the Health Sciences and Interim Chancellor
UMass Medical School

John G. O'Brien, MBA
President and CEO
UMass Memorial Health Care

Strategic Planning Task Force members

David C. Ayers, MD, professor and chair of orthopedics & physical rehabilitation
Douglas Brown, JD, general counsel for UMass Memorial Health Care
Anthony Carruthers, PhD, dean of the Graduate School of Biomedical Sciences

Michael F. Collins, MD, senior vice president for the health sciences and interim chancellor
Michael P. Czech, PhD, professor and chair of molecular medicine

Walter H. Ettinger Jr., MD, MBA, president of UMass Memorial Medical Center and associate dean for clinical and population health research
Marianne E. Felice, MD, professor and chair of pediatrics

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Strategic Planning Task Force members

Robert W. Finberg, MD, professor and chair of medicine

Terence R. Flotte, MD, dean of the School of Medicine and executive deputy chancellor of UMass Medical School

Allan Jacobson, PhD, professor and chair of molecular genetics & microbiology

Can Kayatikin, student representative for the Graduate School of Biomedical Sciences

Nancy Kruger, DNSc, RN, senior vice president and chief nursing officer of UMass Memorial Medical Center

Daniel H. Lasser, MD, MPH, professor and chair of family medicine & community health and interim president of UMass Memorial Medical Group

Demetrius E. M. Litwin, MD, MBA, professor and chair of surgery

Thomas D. Manning, MA, CAGS, deputy chancellor for Commonwealth Medicine and Strategic Facilities Planning

C. Robert Matthews, PhD, professor and chair of biochemistry & molecular pharmacology

Craig C. Mello, PhD, Howard Hughes Medical Institute Investigator and the *Blais University Chair in Molecular Medicine*

Melissa J. Moore, PhD, Howard Hughes Medical Institute Investigator and professor of biochemistry & molecular pharmacology

Abraham N. Morse, MD, chair of the Faculty Council

Bharath Nath, student representative for the School of Medicine

John G. O'Brien, president and chief executive officer of UMass Memorial Health Care

Judy K. Ockene, PhD, interim vice chancellor for faculty administration

Jeffrey Perras, student representative for the Graduate School of Nursing

Michele P. Pugnaire, MD, senior associate dean for educational affairs

Paulette Seymour, PhD, dean of the Graduate School of Nursing

John L. Sullivan, MD, vice chancellor for research

Andrew J. Sussman, MD, MBA, chief operating officer of UMass Memorial Medical Center

Colin Swales, MD, representative for resident education

Douglas M. Ziedonis, MD, MPH, professor and chair of psychiatry

Staff

Robert Jenal, vice chancellor for operations for UMass Medical School

Todd A. Keating, MBA, senior vice president and chief financial officer of UMass Memorial Health Care

Cheryl Lapriore, MBA, chief of staff, UMass Memorial Health Care

Kathleen Q. Powers, MBA, associate vice chancellor and chief of staff



The graphic above illustrates how the Strategic Planning Task Force will operate to create a joint strategic plan for UMass Medical School and UMass Memorial Health Care. The six work groups, each led by co-chairs selected from within or chosen by the task force, will propose solutions for the tasks with which they have been charged. At their disposal will be finance and environmental resources for determining the feasibility of possible solutions they may wish to propose. The work groups will call on the expertise of the various standing committees, boards and councils as they explore ways to bring together the school and hospital system to build a nationally recognized academic health sciences center.

Work groups

Faculty and Leadership Development

Charge:

To develop a strategic plan for faculty and leadership development across the academic health center that provides tools, opportunities and incentives to ensure the success of each individual, their department and the academic health center.

Co-chairs:

Judith K. Ockene, PhD, interim vice chancellor for faculty administration

Douglas M. Ziedonis, MD, MPH, professor and chair of psychiatry

Clinical Care

Charge:

Review the current clinical mission strategic plan and focus on its impact across the other five work groups of the strategic plan, with particular attention to education and research.

Co-chairs:

Andrew J. Sussman, MD, MBA, chief operating officer of UMass Memorial Medical Center

David C. Ayers, MD, professor and chair of orthopedics & physical rehabilitation

Education

Charge:

Anticipate the size and structure of the education programs in five years; identify common needs and opportunities for consolidation and shared solutions (e.g. IT, space, learner services, student life); link to emerging internal and external initiatives; and, make recommendations for aligning and prioritizing resources for the educational mission.

Co-chairs:

Michele P. Pugnaire, MD, senior associate dean for educational affairs

Randall R. Long, MD, PhD, clinical professor and interim chair of neurology

Research

Charge:

To identify and prioritize research areas to develop and expand over the next five years and to analyze and justify the resource needs to fulfill those priorities.

Co-chairs:

Robert W. Finberg, MD, professor and chair of medicine

John L. Sullivan, MD, vice chancellor for research

Public Service

Charge:

Create a unified community service strategy that is sensitive to the three missions of clinical care, research and education. In this context, define levels of intensity to be applied at the local, regional and state levels.

Co-chairs:

Daniel H. Lasser, MD, MPH, professor and chair of family medicine & community health and interim president of UMass Memorial Medical Group

Joyce A. Murphy, MPA, vice chancellor and chief operating officer of Commonwealth Medicine

Acting as a Single Enterprise

Charge:

With the goal of working as one strong academic health center, create a common identity and branding strategy; create a framework for ongoing joint decision making; identify, analyze and execute shared service opportunities; assess potential for co-location of leadership teams; and communicate with all parties as appropriate.

Co-chairs:

Thomas D. Manning, MA, CAGS, deputy chancellor for Commonwealth Medicine and Strategic Facilities Planning

Todd A. Keating, MBA, senior vice president and chief financial officer of UMass Memorial Health Care