

COLLEGE OF PHYSICIANS & SURGEONS *of* COLUMBIA UNIVERSITY

Steering Committee Meeting Launch Phase II - Strategic Planning

January 9, 2012



COLUMBIA UNIVERSITY

*College of Physicians
and Surgeons*

AMC
Strategies

Today's Agenda

I. Launching Phase II – Strategic Planning

- The Planning Process / Timeline
- Phase II – Next Steps
- Strategy Task Force Updates

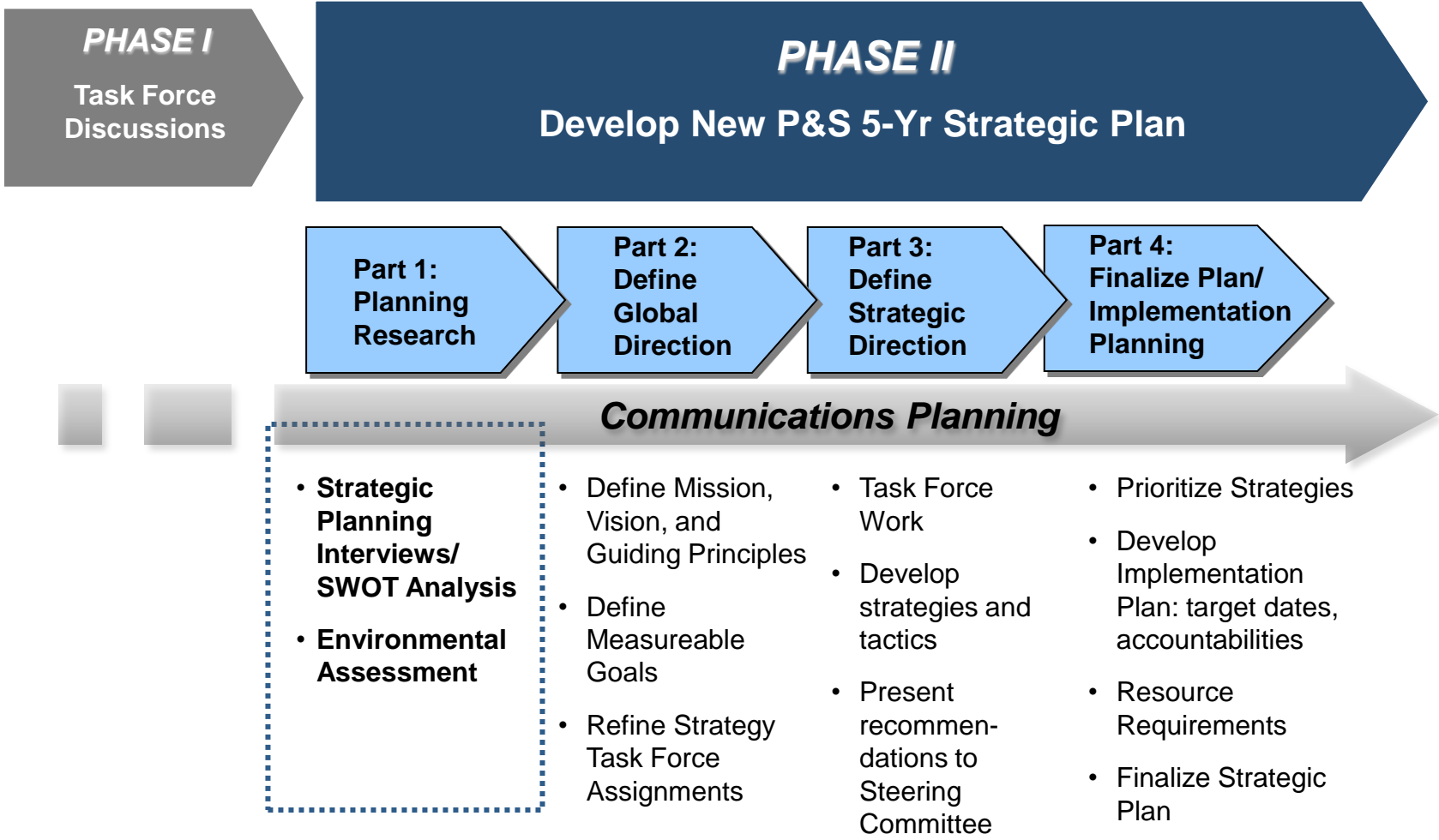
II. AMC Strategies: Clients and Team Bios

I. Launching Strategic Planning Phase II

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

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

PHASE II: Four Critical Components

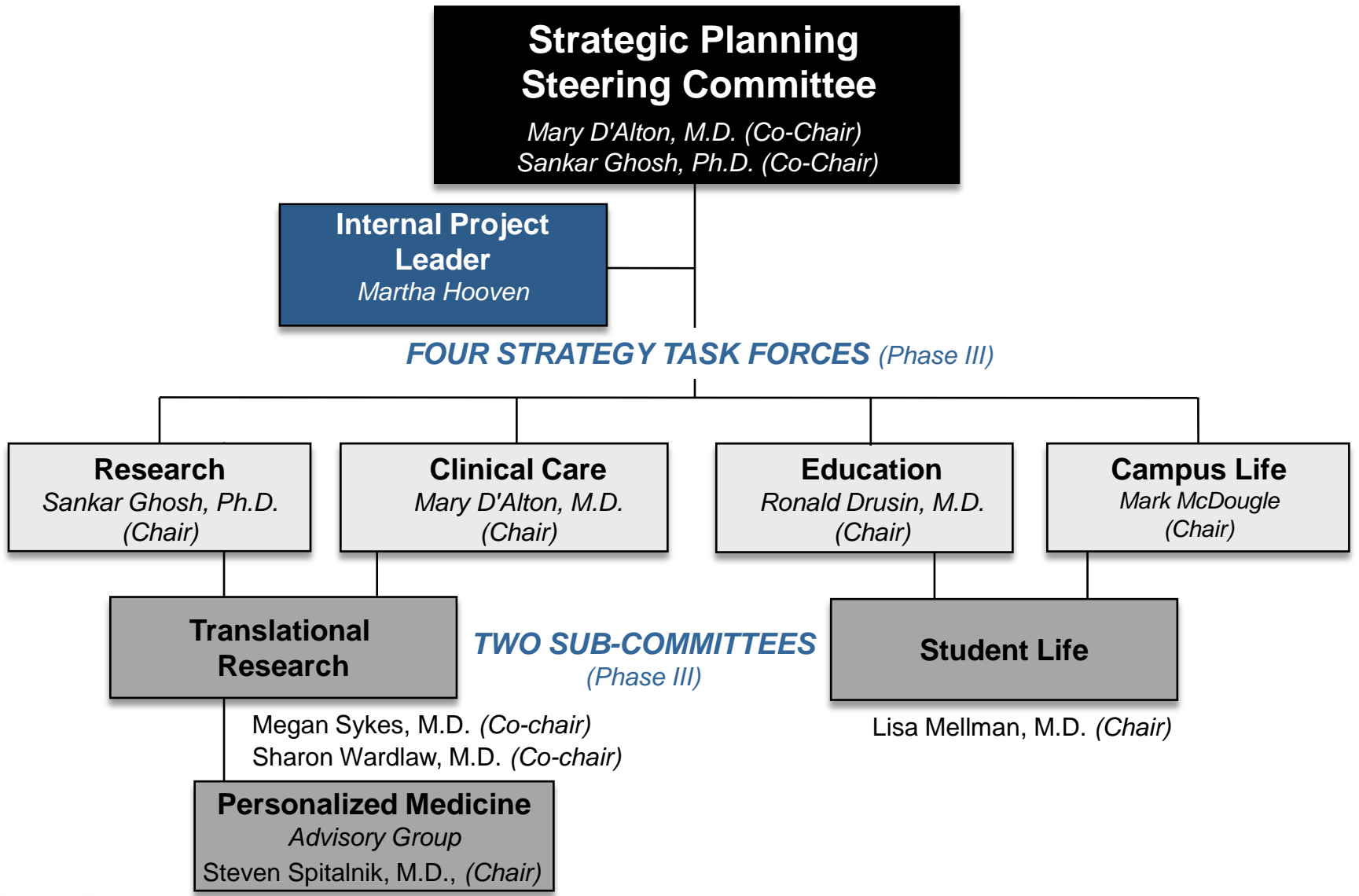


PHASE II: Timeline

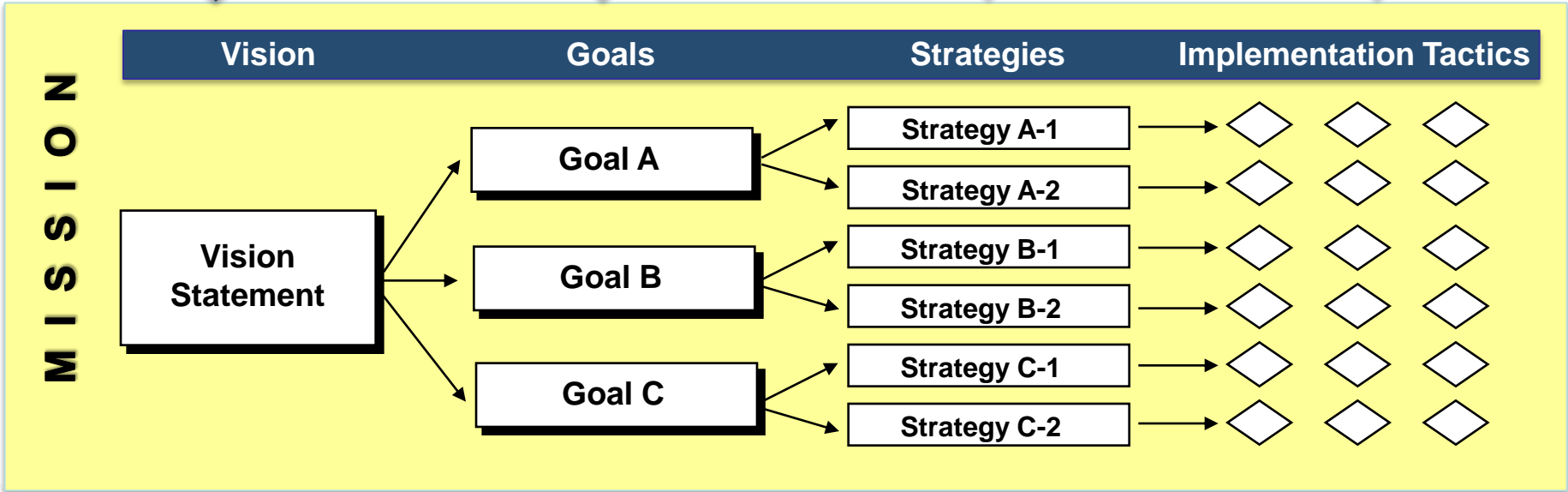
	2011	2012					
	Dec	Jan	Feb	Mar	Apr	May	Jun
PART 1 - PLANNING RESEARCH							
- Activity 1: Strategic Planning Interviews							
- Activity 2: Environmental Assessment (INTERNAL)							
On-site Planning Interviews	X		Str Plng Retreat (2/9)				
Steering Committee Update Meeting		X					
PART 2 - DEFINE GLOBAL DIRECTION							
Steering Committee Strategic Planning Retreat			X				
PART 3 - DEFINE STRATEGIC DIRECTION							
Strategy Task Force Meetings			X	X	X	X	
Steering Committee Meetings			X	X	X	X	
PART 4 - FINALIZE PLAN/IMPLEMENTATION PLNG							
Steering Committee Meeting							X

X = On-site strategic planning meetings

Strategic Planning Organizational Approach



Phase II: Developing the Strategic Framework...
...Each Statement Lays the Foundation for the Next



Ph II Next Steps: Planning Research - Key for Building Mission, Vision & Goals

Phase I Activities:

1. Planning Interviews/SWOT Analysis



2. Environmental Assessment

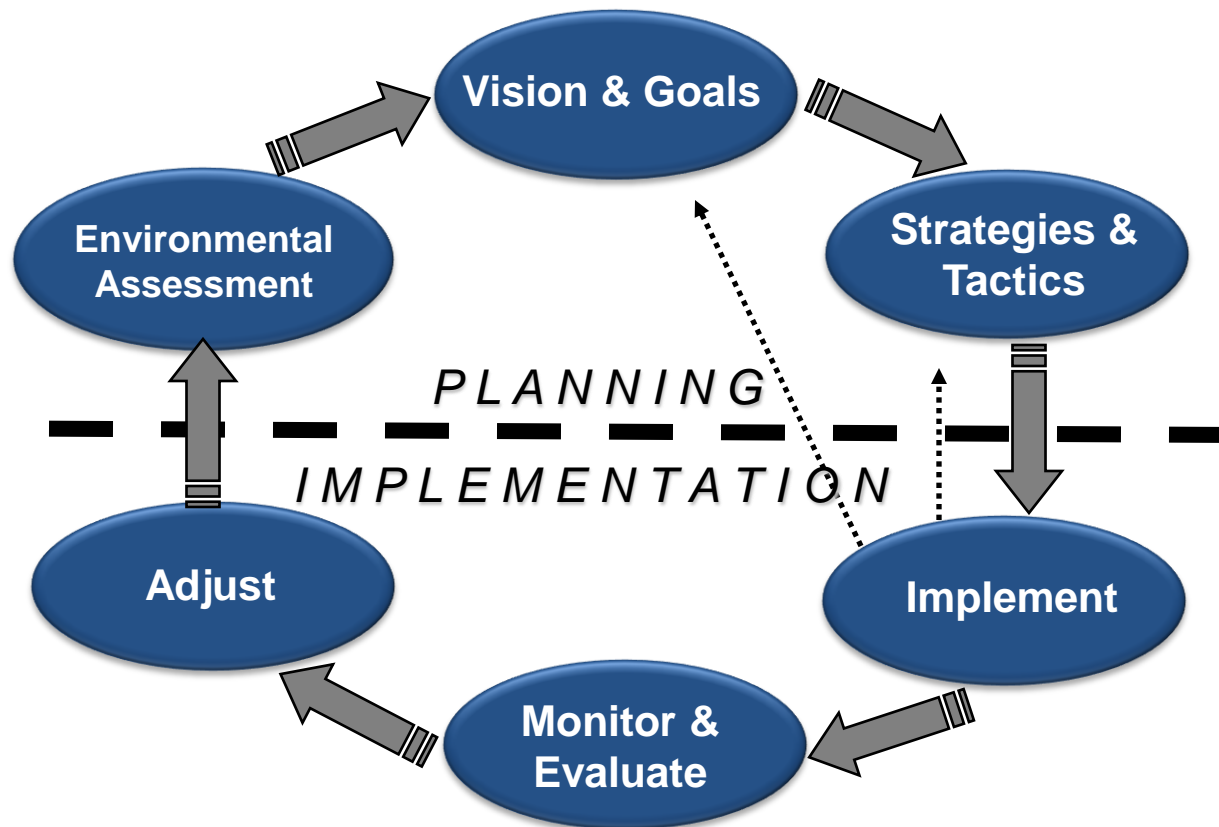


Objective:

- Gather confidential perceptions from internal stakeholders (*“addressing perceptions is as important as addressing reality”*)
- Highlight key internal and external trends relevant to each of the strategy design teams.

Phase II – Part 4: 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”

Strategic Communications – Already Underway for P&S Strategic Planning



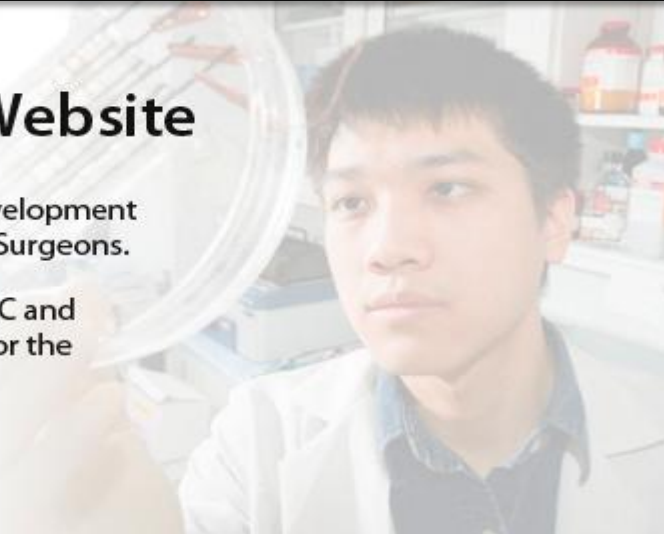
THE P&S STRATEGIC PLAN

- HOME
- FROM THE DEAN
- STEERING COMMITTEE
- TASK FORCES & SUBCOMMITTEES
- SUGGESTIONS

Welcome to the P&S Strategic Planning Website

During this academic year, a Strategic Planning Steering Committee will lead the development of a long-range plan to chart a course for the future of the College of Physicians and Surgeons.

This website is designed to foster collaboration among all members of the P&S, CUMC and NYPH community. Please visit often for updates, and to contribute your own vision for the future of P&S (see link below). We welcome your suggestions.



P&S News



Elan Louis, MD:
Five Questions In Five Minutes

Ideas & Suggestions

Your vision of the future of P&S is important to the planning process. Submit your ideas [here](#).

Video



What Makes
P&S Great?

A message from
Lee Goldman, M.D.

Dean of the College of
Physicians and Surgeons



II. AMC Strategies: *Clients & Bios*

AMC Strategies: Clients

- **David Geffen School of Medicine at UCLA / UCLA Health System***
- Cedars-Sinai Health System
- George Washington University Medical Center
- Georgetown University Medical Center
- Keck School of Medicine of USC
- Partners Harvard Medical International
- St. Louis Children's Hospital / Washington University School of Medicine
- **Stanford University School of Medicine***
- The Brooklyn Hospital Center (Brooklyn, NY)
- The Methodist Hospital (Houston, TX)
- The National Academies of Sciences
- University Hospitals (Cleveland, OH)
- University at Buffalo School of Medicine and Biomedical Sciences
- **University of California, Davis, Health System***
- **University of California, Irvine School of Medicine & Medical Center***
- University of California, San Francisco
- **University of California, Santa Barbara***
- University of Cincinnati Health Sciences Center
- University of Iowa Health Care; University of Iowa Foundation
- University of Iowa Roy J. and Lucille A. Carver College of Medicine
- University of Rochester Medical Center
- University of Utah / University Health Care

** Denotes current AMC Strategies engagement*

AMC Strategies: Team Bios

Diana Carmichael, Principal. Diana is the founder and Principal of AMC Strategies, LLC, established in 2001, built upon 23 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. In 2007, Diana received 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 was the keynote speaker on strategic planning for the 2008 annual meeting of the Association of American Cancer Institutes/Cancer Center Administrators Forum, and was an invited lecturer on strategic planning in the academic setting at Stanford University for the 2008 Physician/Faculty Leadership Development Program.

Rebecka Levan, Senior Manager. Becky has been with AMC Strategies for more eight years, leading several of AMC Strategies client engagements. She 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 23 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.

Jennifer Heenan, Manager. Jennifer will serve as a senior consultant on this engagement, providing planning expertise and team support during all phases of the strategic planning process. Jennifer brings years of experience in conducting market research, environmental assessments, planning interviews, and strategy development. Jennifer also brings experience in working collaboratively with executive teams, boards of directors, faculty, staff and students towards strategy development in the academic setting and effective execution of those strategies. Prior to joining AMC Strategies, Ms. Heenan managed in-house business development and marketing activities for Huntington Hospital in Pasadena, California, and was a member of Ms. Carmichael's strategic planning team at Cedars-Sinai Health System in Los Angeles. She received her B.A. from the University of California, San Diego and her M.P.H. from the University of California, Los Angeles School of Public Health Department of Health Services. Jennifer has been with AMC Strategies since 2003.

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.** Kendall has been with AMC Strategies since 2001 and prior to that, was a member of Ms. Carmichael's strategic planning team at Cedars-Sinai Health System.