STRATEGIC PLANNING APPROACH
UBC DEPARTMENT OF MEDICINE
PROJECT OVERVIEW – DEPARTMENT OF MEDICINE’S STRATEGIC PLAN

Key Drivers:
• Recurring deficit over the past 5 Years has limited the Department’s resource capacity (e.g. faculty renewals is an issue and there is an inconsistent level of admin support).
• Need to strengthen engagement and connections with clinical faculty and distributed sites
• New Leadership – need to set an unified direction

Desired Outcomes:
• Support the operationalization of the Faculty of Medicine’s Strategic Plan within the Department
• Improved integration among internal and external stakeholders to become an effective learning health system
• Improved relationships among key stakeholders, want stakeholders to feel connected
• Fulfillment of social accountability (EDI, ISP)
• Alignment of DoM’s strategic priorities with future budget asks
• Achieve more stability
# Planning Process, Timeline and Proposed Engagement

<table>
<thead>
<tr>
<th>Phase</th>
<th>Description</th>
<th>Outputs</th>
<th>Tools</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Phase 0</strong>&lt;br&gt;Project Planning</td>
<td>Feb - Apr</td>
<td>Stakeholder engagement plan &amp; tools (e.g. survey, website)</td>
<td>Website page - updated planning process, timeline, upcoming events, Surveys - launched through email and website, Town hall sessions at Distributed Sites</td>
</tr>
<tr>
<td><strong>Phase 1</strong>&lt;br&gt;Situation Assessment</td>
<td>Apr – Jun 15</td>
<td>Peer scan results, Insights from relevant department artifacts and research, SWOT</td>
<td>Targeted interviews with FOM leadership and key external partners, Learners Town Hall</td>
</tr>
<tr>
<td><strong>Phase 2</strong>&lt;br&gt;Strategy Development</td>
<td>Jun 15 – Oct 1</td>
<td>Draft strategic framework (mission, vision, values, operating principles goals and metrics) integrated with Division’s and University’s priorities</td>
<td>Faculty, staff and learner town halls soliciting input on draft strategic framework, Website page - updated to solicit broad feedback on draft strategic framework, In-person validation with Advisory Committee, FOM leadership and other key stakeholders</td>
</tr>
<tr>
<td><strong>Phase 3</strong>&lt;br&gt;Activation</td>
<td>Oct 1 – Dec 20</td>
<td>Finalized strategic framework, Prioritization of goals, Actions supporting goals, Plan narrative, communication and implementation tools</td>
<td>Faculty, staff and learner town halls/retreat to validate components of strategic framework, Road shows for validation and information sharing, In-person validation with Advisory Committee</td>
</tr>
<tr>
<td><strong>Phase 4</strong>&lt;br&gt;Implementation &amp; Sustainment</td>
<td></td>
<td>Year 1 action plan with clear deliverables and accountabilities, Measurement plan, Launch of plan and messaging, Annual reprioritization</td>
<td>Website page - updated with strategic plan and launch communication, Broad communication/validation of strategic plan (e.g. Road shows, email, Faculty meetings, etc.)</td>
</tr>
</tbody>
</table>

*Stakeholder Validation Taking Place Throughout the Project*
## STRATEGIC PLAN FRAMEWORK AND COMPONENTS

### Vision, Mission and Values

<table>
<thead>
<tr>
<th>Core Areas</th>
<th>Core Area 1</th>
<th>Core Area 2</th>
<th>Core Area 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Success Statements</strong></td>
<td>Success Statement written as a mini vision statement of the long-term desired change</td>
<td>Success Statement written as a mini vision statement of the long-term desired change</td>
<td>Success Statement written as a mini vision statement of the long-term desired change</td>
</tr>
<tr>
<td>What does success look like?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Goals &amp; Actions</strong></td>
<td>Goal 1</td>
<td>Goal 1</td>
<td>Goal 1</td>
</tr>
<tr>
<td>What are the goals supporting each core area?</td>
<td>Action 1</td>
<td>Action 1</td>
<td>Action 1</td>
</tr>
<tr>
<td>What are the actions supporting each goal?</td>
<td>Action 2</td>
<td>Action 2</td>
<td>Action 2</td>
</tr>
<tr>
<td><strong>Goal 2</strong></td>
<td>Goal 2</td>
<td><strong>Goal 2</strong></td>
<td><strong>Goal 2</strong></td>
</tr>
<tr>
<td>Action 1</td>
<td>Action 1</td>
<td>Action 1</td>
<td>Action 1</td>
</tr>
<tr>
<td>Action 2</td>
<td>Action 2</td>
<td>Action 2</td>
<td>Action 2</td>
</tr>
<tr>
<td><strong>Operating Principles</strong></td>
<td>Metrics</td>
<td>Metrics</td>
<td>Metrics</td>
</tr>
<tr>
<td><strong>Metrics</strong></td>
<td>How do we measure success for each core area?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Priority for year 1 implementation*
The Project Sponsor (Anita Palepu) provides strategic direction and context, approves project plan, signs off on deliverables, and makes decisions during inflection points.

The Strategy & Decision Support team provides direction, advising, facilitation support and seeks alignment with UBC-wide strategic plans.

Implementation committee will be in place during the plan implementation stage.

Various stakeholders are involved during the development and validation of the plan.

Note: refer to the following two slides for further information on the Advisory Committee and Working Group.
ADVISORY COMMITTEE ROLE AND MEMBERSHIP

Advisory role: feedback, directional input, alignment with UBC-wide priorities, validation

Members:

- Dr. Anita Palepu, Department Head & Program Director of the Clinical Investigator Program
- Dr. Andrea Townson, Associate Head Education
- Dr. Teresa Tsang, Associate Head Research
- Division Heads (18)
- Dr. Tricia Tang, Program Director, Experimental Medicine Program
- Dr. J. Mark Roberts, Program Director, Postgraduate Education Program
- Dr. Harpinder Nagi, Program Director, Undergraduate Education Program
- Dr. Kevin Eva, Program Director, Educational Research & Scholarship
- Dr. Sharlene Gill, Program Director, Faculty Mentorship Program
- Dr. Wee-Shian Chan, Hospital Department Head, BC Women's Hospital

- Dr. Gerald da Roza & Dr. Mark Ballard, Hospital Department Head, Royal Columbian Hospital
- Dr. Ken Gin, Hospital Department Head, Vancouver Acute
- Dr. Emily Lai, Clinical Faculty Representatives Committee (Chair)
- Dr. Laura Farrell, Island Medical Program Distributed Site Representative
- Dr. Sharla Rae Olson, Northern Medical Program Distributed Site Representative
- Dr. Jasmine Kerr, Southern Medical Program Distributed Site Representative
- Donna Combs, Administrative Coordinator to the Head
- Delaram Behnami, Research Manager
- Amanda Milord, HR Manager
- Kathy Standeven, Sr. Education Manager
- Sharon Duguid, Associate Director, Finance (FOM)
WORKING GROUP (WG) ROLE AND MEMBERSHIP

WG Role: Responsible for carrying out the development of the strategic plan with support from the Project Sponsor. Acts as a channel for information sharing between WG and their respective groups.

Anita Palepu  
Head, Department of Medicine  
Project Sponsor

Teresa Tsang  
Associate Head, Research

Andrea Townson  
Associate Head, Education

Donna Combs  
Administrative Coordinator to the Department Head

Delaram Behnami  
Manager, Research

Kathy Standeven  
Senior Manager, Education

Lesley Charter-Smith  
Director, Strategy & Decision Support (SDS)  
Facilitator

Margarita Fullerton  
Senior Manager, Strategy & Decision Support (SDS)  
Facilitator