Strategic planning is a **process** to produce **innovative and creative ideas** which serve as the core framework for an organization and the design of its **future**.

**Why do a strategic plan?**

Developing strategy takes valuable time and commitment by a good number of people in the organization. So, why are we taking the time to do a strategic plan for the School of Dentistry?

1) **To set direction and priorities**

First and foremost, a strategy sets direction and **establishes priorities**. It defines the School’s view of success and prioritizes the activities that will make this view a reality. The strategy enables staff and employees to know what they should be working on, and what they should be working on first.

2) **To get everyone on the same page**

Groups and departments cannot be working to achieve different aims, or going in different directions. Once we define a strategic direction, **all operations and departments must be moving in the same direction to achieve the School’s goals**.

3) **To simplify decision-making**

With priorities defined, important decisions about **investment and disinvestment** of valuable resources (headcount and funding). Where should you put your increased budget dollars? What should be disinvested if budgets are reduced? Priorities also make it easier to say no to distracting initiatives.

4) **To drive alignment**

With a plan, hard-working people will be putting their best efforts into areas that contribute to strategic success because **their activities will be aligned with the priorities**. The School’s strategy serves as the vehicle for answering the question, “How can we better align all our resources to maximize our strategic success?”

5) **To communicate**

Some leaders may walk around with a virtual strategy in their minds - they know where their organization needs to be and the key activities that will get it there. But if the strategy isn’t down on paper and hasn’t been thoroughly communicated, few people can act on it. When your staff, students, suppliers, and even patients know what your priorities are and what you value, opportunities for people to help you are maximized.
STEP 1. Validate & Update Mission, Vision, & Values

MISSION - the reason the UCSF School of Dentistry exists.
“UCSF advances health worldwide through innovative health sciences education, discovery and patient care.” (Overarching, official UCSF Campus Mission new for 2014-2015)

Tagline: “Continue leading the next revolutions in health”

Current SoD Mission: “Advancing oral, craniofacial, and public health through excellence in education, discovery, and patient-centered care.”

Updated SoD Mission Statement

“Advancing health through excellence in Patient Care, Education, and Discovery.”

Tagline: “Excellence in Patient Care, Education, and Discovery.”

VISION - A photograph in words of the future that provides the inspiration for both daily operations and strategic decisions.

“To be the world’s preeminent health sciences innovator.” (UCSF Mission new)

Current SoD Vision: “To lead worldwide in dental education and public health, clinical practice, and scientific discovery.”

Updated Vision Statement (so far)

“To be preeminent in oral & craniofacial health worldwide”

To be the leader in oral & craniofacial health sciences worldwide
To be preeminent in oral & craniofacial health sciences worldwide
VALUES - Operating philosophies and core beliefs that guide the School’s internal conduct, as well as its relationship with patients, partners, and all shareholders. Shared values dramatically and positively affect organizational performance.

Current Discussion:

• Adding Diversity and Inclusion as a new value.
• ADEA meeting regarding Humanism and accreditation - CODA expected of us in defining and creating humanism in the institution, or a humanistic environment.
• 3 person Ad Hoc Committee to review and make recommendations for other wordsmithing of all Values next meeting.

Diversity and Inclusion

• We value and embrace diversity and inclusion as a source of innovation, lifelong learning, and personal fulfillment.
• We strive to learn from all who bring a richness of experiences, beliefs, and perspectives to our community.
• To attain our goals and sustain the health system, we will make effective use of the talents and abilities of all people.
• We believe that diversity contributes to a healthy society by challenging preconceptions, encouraging critical thinking, and helping health providers and students learn to communicate effectively with people.
• Education within a diverse setting prepares students by fostering mutual respect and teamwork and a full appreciation of humanity.
• Embracing diversity helps build communities whose members are judged by the quality of their character and their contributions.

Excellence

Integrity

Respect

Innovation

Accountability

Leadership

Social Responsibility
“EFFECTIVE LEADERS EXPLICITLY REINFORCE ORGANIZATIONAL VALUES ON A CONSTANT BASIS.” (HBR, David Garvin and Michael Roberto)

How can values be reinforced within an organization?

✧ **Lead by Example** – know the values, use them, recognize others who practice them

✧ **Consciously use the values in your daily decision making.** Whenever you’re making decisions about your group, the school, students, employees, patients, etc., be sure to have the values close. As you discuss your options, ask “is this decision in alignment with our values and priorities?” Make them part of the process in hiring team members. It’s a lot easier to hire someone who shares your values than to persuade someone to adopt them.

✧ **Include the Values in performance coaching and written evaluations.** Areas of strengths and improvements can be usually related to an appropriate value. e.g. Excellence, Respect (collaboration), Accountability (efficient operations, reporting)

✧ **Celebrate team members when their actions embody the values.**

✧ **Tell Stories Worth Sharing:** Look for stories that exemplify the SoD values in action. These should become legendary stories in the organization. Tell them at stand-up meetings; add them to your shared drive; make them part of your new employee orientation; and celebrate them at recognition events.

✧ **Openly talk about your values internally.** Highlight one value each month – adding Diversity and Inclusion is a great opportunity to start communicating your values.
STEP 2. Updating the Strategic Objectives

UCSF Campus Key Areas

The UCSF campus, as a whole, continues with the same five key areas of emphasis that were established during the tenure of the previous Chancellor per Chancellor Hawgood.

1. Patient care
2. Discovery
3. Education
4. People
5. Business

Global Oral Health*

*Adding “Global Health” would be in line with an additional campus priority. We will attempt integrating Global strategies in each of the first five areas to see if that can be done effectively. If not, we will create a separate Global Oral Health strategic objective.

The School of Dentistry Strategic plan must “dock” with and support the UCSF Campus and Clinical Enterprise Strategic Plans to best leverage the resources and benefits of the Campus and to contribute to the overall mission and direction.

UCSF Clinical Enterprise Strategic Plan 2014-2019

UCSF Clinical Enterprise Strategic Plan “Will do’s” *(by the 5 or 6 key areas)*

1. Organize and implement clinical programs as a system of care to enhance patient access and transition of care. **Patients & Health**
2. Focus UCSF abilities to rapidly translate research results into groundbreaking treatments. **Discovery**
3. Foster deeper clinical relationships with other health care organizations to offer patients outstanding availability of primary care and rapid access to specialized medicine.
4. Use technology to better communicate with patients and connect and support clinicians.
5. Everyone will share the singular priority to continuously improve processes and enhance the care we provide to patients. **Business**
6. Eliminate waste and reduce costs to remain competitive and affordable. **Business**
7. Prepare the next generation of clinicians for a different practice of medicine in which teamwork, focus on improving the health of the populations as well as healing individual patients, and advanced information management are the norm. **Education**
UCSF HEALTH SYSTEM PRIORITIES 2014-2019 (by the 5 or 6 key areas)

1. **Continue the pursuit of excellent specialty medicine, with renewed focus on**
   **a) streamlining access to our services, and b) coordination of care.**
   **Patients/Health** – World-class patient-centered care and improving patient access and care transitions. Demonstration of the value of our care to the market requires focus on documenting and communicating patient outcomes and achieving efficiencies to deliver higher quality at lower cost.
   **Discovery** – Rapid translation of research results into groundbreaking treatment.
   **Global Oral Health** - Be a leader in patient-care, discovery and education related to global oral health.

2. **Promote a high value system of care, engaging with partners in the emerging**
   **accountable health care organization model, with a focus on optimizing health and**
   **health care for a regional population of patients.**
   **Business** – Engage with partners in the emerging Accountable Health Care Organization (ACO) model. High importance placed on inter-disciplinary team-care approaches, real-time data to inform tailoring of care, flawless coordination of services between primary and specialty care providers.

3. **Accelerate our implementation of a culture of Continuous Process Improvement (CPI).**
   **People** – Empower individuals and teams at all levels to develop and adopt practices that enable the highest quality of services to patients. Train faculty and staff in the methods of the Lean process improvement system.
   
   * **Lean** is a simple and pragmatic approach with a fundamental requirement of identifying resources that are being wasted or not being used at maximum potential.
   
   **Education** – Training the next generation of health professionals for the new health care environment.
   **Business** – Process Improvement culture. Higher system throughput.
2010-2014 STRATEGIC OBJECTIVES

I. **Patients/Health**: A) Provide professional, comprehensive, high quality patient-centered oral health care. B) Collaborate with local, regional, and global community partners to promote oral health worldwide.

II. **Discovery**: Be a world leader in scientific discovery and its translation into health benefits for patients and society.

III. **Education**: Provide an excellent education that equips our students, residents, and post-graduates to be future leaders in health care delivery, research, and education.

IV. **People**: Provide a supportive learning and work environment that attracts the best students, faculty, and staff who can meet the changing needs of the School and the profession.

V. **Business**: Enhance resource management and business practices.

Current Discussion:
Renew Strategies, Tactics and Metrics. Using the new strategic objectives under the campus key areas, clarify and streamline where possible.

STRATEGIC OBJECTIVES 2015-2020 draft

**Patients and Health:**

I. Provide outstanding, integrated patient-centered care, under the banner of a UCSF Dental Center. (Dental Clinical Enterprise)

**Discovery:**

II. Be a world leader in scientific discovery and its translation into improved patient care and public health.

**Education:**

III. Prepare the next generation of clinicians and scientists for the new health care system and equip them to be future leaders in the health care profession.

**People:**

IV. Promote a supportive learning and work environment that attracts the best students, faculty, and staff.

**Business:**

V. Achieve a culture of Continuous Process Improvement.
   a. Fiscal sustainability

[Global Oral Health (include in each area above – check at end of V.)]

Be a leader in patient-care, discovery and education related to global oral health.
STEP 3. Update Strategies, Tactics and Metrics

Our Format

**Strategic Objective**: A broadly defined objective that an organization must achieve to make its strategy succeed.

**Strategy**: A method or plan chosen to bring about a desired future, such as achievement of a goal or solution to a problem.

**Tactics**: The means by which a strategy is carried out; planned and ad hoc activities meant to deal with the demands of the moment, and to move from one milestone to other in pursuit of the overall goal(s).

**Metrics**: Standards of measurement by which efficiency, performance, progress, or quality of a process, or product can be assessed.

* Note: The External Strategic Plan document contains the Strategic Objectives and Strategies. The Internal document incorporates the Tactics and Metrics into the external document.

School of Dentistry Strategic Objectives, Strategies, Tactics & Metrics

**Patients & Health:**

I. Provide excellent integrated patient-centered care under the banner of UCSF Dental Center.

**Strategies, tactics and metrics**

**Discovery:**

II. Be a world leader in scientific discovery and its translation into improved patient care and public health.

**Strategies, tactics and metrics**

**Education:**

III. Prepare the next generation of clinicians for the new health care system and equip our students, residents, and post-graduates to be future leaders in the health care profession.

**Strategies, tactics and metrics**

**People:**

IV. Promote a supportive learning and work environment that attracts the best students, faculty, and staff.

**Strategies, tactics and metrics**

**Business:**

V. Achieve a culture of Continuous Process Improvement.

**Strategies, tactics and metrics**

**Global Oral Health**

Be a leader in patient-care, discovery and education related to global oral health.

Add strategies, tactics and metrics into I – V if seamless
STEP 4. Update Strategies, Tactics and Metrics

Strategic Plan Review process & timing

Measurement & Reporting timing & methodology

Work with Departments and Groups, as requested, to develop department level strategic plans