UMass Academic Health Sciences Center
Strategic Planning Update

March 2008
Introduction
Agenda

- Planning Process and Participants
- Mission, Vision and Evaluation Criteria
- Work Group Interim Reports
- Outstanding Questions
- Next Steps
Planning Process and Participants
UMass Academic Health Sciences Center
Strategic Planning Task Force Members

David Ayers, MD, Chair of Orthopedics
Doug Brown, General Counsel, UMMHC
Tony Carruthers, PhD, Dean GSBS
Michael Collins, MD, Interim Chancellor UMMS, Sr. Vice President for the Health Sciences
Mike Czech, PhD, Chair of Molecular Medicine
Walter Ettinger, MD, MBA, Assoc Vice Provost Clinical & Population Health Research (co-chair)
Marianne Felice, MD, Chair of Pediatrics
Bob Finberg, MD, Chair of Medicine
Terry Flotte, MD, Dean School of Medicine, Provost and Executive Deputy Chancellor UMMS (co-chair)
Allan Jacobson, PhD, Chair of MGM
Can Kayatekin, Graduate Student Representative
Nancy Kruger, DNSc, RN, SVP and Chief Nursing Officer, UMMHC
Joyce Murphy, Vice Chancellor and COO, Commonwealth Medicine
Dan Lasser, MD, Interim President of the Medical Group
Demetrius Litwin, MD, Chair of Surgery
Tom Manning, Deputy Chancellor, Commonwealth Medicine, Strategic Facilities Planning
C. Robert Matthews, PhD, Chair of Biochemistry & Mol. Pharmacology
Craig Mello, PhD, Nobel Laureate, Senior Science Advisor
Melissa Moore, PhD, Professor of Biochemistry and Molecular Pharmacology
Randall Long, MD, PhD, Interim Chair, Neurology
Abraham Morse, MD, Faculty Council Chair
Charles Pagnam, Vice Chancellor for Development
Bharat Nath, Medical Student Representative
John O’Brien, President, UMMHC
Judy Ockene, PhD, Interim Vice Provost for Faculty Affairs
Michele Pugnaire, MD Senior Associate Dean for Education
Paulette Seymour-Route, PhD, Dean, GSN
John Sullivan, MD, Vice Provost for Research
Andy Sussman, MD, COO of UMMHC
Doug Ziedonis, MD, MPH, Chair of Psychiatry
Jeffrey Perras, GSN Student Rep
Colin Swales, MD, Resident Rep

Staff:
Bob Jenal, Vice Chancellor, Administration and Finance
Todd Keating, Senior Vice President, CFO, UMMHC
Cheryl Lapriore, Chief of Staff, UMMHC
Kathleen Powers, Associate Vice Chancellor Administration, Chief of Staff, UMMS
Lisa Beittel, Assistant Dean for Administration, Chief of Staff, Office of the Dean, Provost and Executive Deputy Chancellor
Mission, Vision and Evaluation Criteria
Mission and Vision

Who We Are:
- A leading academic health sciences center, comprised of UMass Medical School and UMass Memorial Health Care, with a common purpose to serve the public interest.

Why We Serve (our mission):
- To advance the health and well being of the people in the Commonwealth and world through pioneering advances in education, research and health care delivery.

What We Seek to Accomplish (our Vision):
- To be recognized as a top 25 Academic Health Sciences Center.

Vision Elements:
- Be among the nation’s leading academic health science centers in achieving excellence in the practice of safe, high quality care.
- Design and employ innovative educational methods to address the needs of a diverse workforce of educators, clinicians and scientists to meet the future health needs in Massachusetts and the US.
- Develop independent educators, clinicians and scientists equipped to become the next generation of outstanding leaders in health care.
- Recruit, nurture and retain outstanding scientists who will make breakthrough discoveries that advance the practice of health care.
- Translate scientific discoveries to improve patient outcomes and address the root causes of poor health.
- Partner to create and optimize health care initiatives that improve the health of the communities we serve.
Evaluation Criteria

Feasibility
- All initiatives must first demonstrate feasibility and sustainability over the long term.

Consistency with Vision
- Initiatives most likely to contribute to our standing as a top 25 enterprise will be preferred over others.

Transformational Impact
- Priority will be given to those initiatives with the most potential to fundamentally and positively alter either basic science or medicine.

Community Impact
- Initiatives that positively impact community health and well being in Worcester, Central Massachusetts and the entire Commonwealth of Massachusetts will be given priority.

Distinction
- Priority will be given to those initiatives that build upon our distinctive strengths and attributes, which set us apart from other academic health science centers.

Degree of Integration
- Initiatives which involve substantial linkages across missions and/or unify interests among multiple constituencies will be given preference.
Interim Work Group Reports
Strategic Planning Work Groups

UMass
Academic Health Sciences Center
Strategic Planning Task Force

- Faculty and Leadership Development
- Clinical Care
- Education
- Research
- Public Service
- Acting as a Single Enterprise
Continuum of AASE Recommended Initiatives

The recommendations from the AASE Work Group can be viewed along the following continuum, based on the type and degree of integration proposed.

- **Communication**: Sharing of information to enhance teamwork and alignment
- **Coordination**: Deliberately acting together for a better result
- **Standardization**: Establishing shared benchmarks or rules
- **Integration**: Combining or blending into a functional or unified whole
- **Consolidation**: Eliminating redundancy by forming a single entity

### Less Integrated
- Subgroups Focused on...
  - Capital Planning and Management
  - Development
  - Diversity and Equal Opportunity
  - Facilities
  - Financial Services
  - Government Relations

### More Integrated
- Subgroups Focused on...
  - Human Resources
  - Information Services
  - Library Services
  - Marketing and Public Relations (including Branding)
  - Strategic Planning
  - Technology Management and Compliance
Example of AASE in Action:
Medical Informatics Solution for Research and Quality
Example of AASE in Action: Medical Informatics Solution for Research and Quality

Clinical Research Data Workflow
Working DRAFT

- Investigator completes Human Subjects course to obtain account to access MICARD
- Investigator uses MICARD to query de-identified, anonymized clinical data set
- Investigator prepares IRB application for clinical research

- IRB reviews application
- IRB can run query against MICARD to verify details in application
- IRB defines parameters for data access and usage

- CCTS/CRO reviews IRB decision
- CCTS/CRO uses same query to extract limited data set for clinical investigator
- The architecture will enable CCTS/CRO to extract the extract time defined data set as authorized by the IRB even though the repository may contain new data

Clinical Research
Strategic Initiatives: Education

- **Integrate infrastructure** across the UMMS Educational Enterprise, under the direction of the Provost’s Office

- Effectively expand, right-size and diversify our learner pool through **enrollment expansion and management**

- Provide the space, amenities, technology and communications infrastructure, and values to assure optimal teaching, learning and well-being (Educational Home)

- Pursue **educational program innovation** to prepare our learners for the competencies of the future

- Develop and diversify **educational partnerships**, locally, across Massachusetts, nationally and internationally

- Sustain the quality, diversity and depth of our **student population** and the **educational workforce** to keep pace with expanding enrollment, curriculum innovation and professional educational development
Strategic Initiatives: Research

- Establish a home and infrastructure for clinical and translational investigators in all departments across UMMS/UMMHC
  - Establish the **Center for Clinical and Translational Science** to provide clinical research infrastructure, education and training
  - Establish a **Clinical Data Warehouse** to support UMMS/UMMHC clinical investigators
  - Establish a “**Conquering Diseases**” **Biorepository** to support clinical investigation

- Build clinical research **within the Clinical Centers of Excellence**
  - Recruitment of clinical research leaders
  - Development of junior clinical research faculty
  - NIH and industry funded patient-oriented research

- Develop the **Quantitative Health Science Department, Bioinformatics program** and the **Advanced Therapeutic Cluster**
  - Recruitment of outstanding scientists in RNA biology, gene therapy, and stem cell research

- In order to maintain our competitive edge as a world class **basic science enterprise**, we need to continue to recruit outstanding basic scientists and to continue to support and maintain the basic science research infrastructure, i.e., **state-of-the-art** core facilities.

- In order to change the way medical care is delivered in the future we are committed to **research** on new methods to ensure **delivery** of the highest **quality health care** to the community.
Strategic Initiatives: Clinical Care

- Comprehensively integrate **evidence-based medicine** (including health care quality, patient safety, and patient outcomes) as a core theme of research, educational and clinical programs.
- Organize patient encounters in a manner that facilitates **invitations to participate in research**.
- Organize **clinical data** from the entire clinical system such that it is readily accessible for research and quality initiatives.
- Recruit **clinical researchers** and develop career tracks with appropriate support.
- Establish an **organizational space plan** that optimizes the use of clinical, research and educational space based upon mutually agreed to principles and focuses on collaboration between all parties. This space plan should meet the needs of our teaching and clinical research enterprises, and should include the components of an **“educational home” for all trainees**.
- To establish, support and assess a **“learning environment”** with core values that assure respect for individuals, valuing of diversity, and modeling of professional standards of conduct in all teacher-learner interactions. This environment includes **all aspects of clinical care and physician relationships** which are observed by learners. This initiative should include development of the quality, diversity, and depth of our clinician-educator workforce.
- Support and enhance **GME programs** with the goal of **recruiting the best possible trainees** and continually improving the clinical training experience.
- Review and coordinate **educational partnerships/affiliations**, with other teaching settings, to create alignment with overall strategic objectives. Assure our learners the optimal choice, quality, diversity and “best-fit” for their clinical and research needs.
- Development of the quality, diversity, and depth of our **clinician-education workforce**, keeping pace with expanding enrollment, curriculum innovation, and professional education development.
Strategic Initiatives: Faculty and Leadership Development

- Establish a Faculty and Leadership Development **Advisory Team** to ensure that activities and initiatives are aligned with one another and the core mission and strategic direction.
- Establish a **Center for Faculty Development** to link resources across the enterprise to enhance the ability of faculty to achieve performance excellence, focusing on:
  - Common faculty core competencies
  - Inventory of resources
  - Identification of synergies, gaps and opportunities
  - Advice to key leaders regarding faculty and leadership development regarding leadership development
- Develop a **Leadership Institute** to facilitate leadership and team development, focusing on:
  - Common leadership competencies
  - Inventory of resources
  - Identification of synergies, gaps and opportunities.
  - Linkages of leadership development efforts
  - Training
  - Alignment with the Women’s Leadership Planning Group and Minority Faculty Subcommittee.
  - Advice to key leaders
Strategic Initiatives: Public Service

- Create a **joint office for public service activities** to:
  - Create, maintain, and publish a living inventory of public service initiatives
  - Effectively measure the impact of public service initiatives
  - Identify synergies, opportunities and gaps in public service initiatives
  - Facilitate the identification and implementation of the marquee initiatives
  - Measure and report the results of the marquee initiative

- Create, publish and maintain a **living inventory** of public service initiatives at UMMS and UMMHC.

- Identify a **“marquee” public service initiative** that UMMS and UMMHC will commit to addressing jointly.
Key Questions for the Future State of UMass Academic Health Center

- What will be the model for health care delivery in the future? Can we serve as the laboratory for that model?
- How will we educate the workforce for the affordable, accessible health care marketplace of the future?
- What will be the learning environment of the future? Can we rewrite the hidden curriculum?
- How will we translate discovery into practice in the future?
- What will be our impact in the world?
Outstanding Question: UMass Global Strategy
“We owe it to the World . . . ” V. Ambros
Outstanding Question: Defining our Global Strategic Goals

- What role will UMass Academic Health Center play in the “flat world” of global health care?
  - Research
  - Education
  - Clinical and Public Service
  - Strategic Partnerships
## Phase I Campus Outreach:
### Steering/Leadership Bodies of UMMS and UMMHC

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<thead>
<tr>
<th>Meeting/Constituents</th>
<th>Meeting Dates</th>
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<tbody>
<tr>
<td>Faculty Council <em>(including Graduate Council, Scientific Council, EPC)</em></td>
<td>Thursday, March 6</td>
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<tr>
<td>UMMHC Senior Managers Meeting <em>(including Executive and CEO Teams)</em></td>
<td>Tuesday, March 18</td>
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<tr>
<td>Leadership Council <em>(including Medical School Leadership, Executive Council, Three Schools)</em></td>
<td>Tuesday, March 25</td>
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<tr>
<td>Open Meetings (University, Memorial and Hahnemann campuses)</td>
<td>Monday, March 24 (University Campus; Memorial and Hahnemann TBD)</td>
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<tr>
<td>UMMS Department Heads</td>
<td>Thursday, March 6</td>
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<tr>
<td>UMMHC Board of Trustees</td>
<td>Wednesday, April 23</td>
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<tr>
<td>General Faculty Meeting</td>
<td>Wednesday, April 16</td>
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<tr>
<td>Other <em>(have we missed any stakeholder groups?)</em></td>
<td>TBD</td>
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Next Steps

- Obtain input from key constituents during campus outreach
- Strategic Planning Task Force (SPTF) to provide feedback and determine priorities of recommendations
- Work Groups to revise recommendations based on SPTF and key constituents feedback
- Prepare final plan by May 2008