## Contents

1. What is strategic planning? ................................................................. 2

2. Strategic Planning at Faculty of Medicine – where are we? ......................... 3

3. The Faculty of Medicine Strategic Plan: “The Way Forward 2010-13” .................. 3

4. What is an environmental scan? ............................................................... 6

5. Why do departments and units need strategic plans? How does it all fit together? ........ 7

6. A 4-step guide to planning at the Departmental and Unit level ................................ 8

7. Considerations for Organizing a Strategic Planning Retreat ..................................... 9

8. Tips from successful planning initiatives .................................................... 10

   Clinical Department .................................................................................. 10

   Basic Science Department ......................................................................... 10

   Dean’s Office Unit ..................................................................................... 10

9. Attachments/Links .................................................................................. 11
1. What is strategic planning?

A strategic plan is a brief, clear and easily communicated statement which expresses where an organization wants to be in the future, and how it intends to get there. It reflects consensus, shared aspiration and faculty-wide priorities.

Key dimensions of a strategic plan:

- **Mission**: ... why we exist, what we do
- **Vision**: ... a vibrant and compelling image of what we want to create
- **Values**: ... the fundamental rules by which we conduct our “business”
- **Strategic Directions**: ... the major initiatives needed to realize the Vision
- **Strategic Action Plan**: ... the specific actions needed to “move” the Directions (priority)

### A strategic plan is not...
- a replacement for functional plans
- structured to deal with everything
- a long range plan
- detailed
- “fixed”

### It...
- gives functional plans context and direction
- focuses on those requiring strategic intervention
- focuses on setting priorities for a specific time frame
- focuses on getting the basics right
- is a living document, can be refined as conditions change

### A simple strategic planning process...

**Where are we now?**
- What are we doing well? What are the challenges?

**Where do we want to be?**
- What are our emerging issues?

**How do we get there?**
- What are our priorities? How can we accomplish our goals?

**How are we doing?**
- Annual monitoring – are we achieving our goals?
2. Strategic Planning at Faculty of Medicine – where are we?

*The Way Forward*, the Faculty of Medicine’s strategic plan, is conceived as a living document, the product of ongoing consultation and annual retreats in the Faculty of Medicine.

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2009/10
The Way Forward
2010-2013

2010/11
Retreat Strategic “Refresh”

2011/12
Dept Heads & NB Relationship Building Retreat

2012/13
First combined Heads and Dean’s Unit Retreat

2013/14
1 year renewal

2014
New plan

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3. The Faculty of Medicine Strategic Plan: “The Way Forward 2010-13”

- 4 pillars
  - Teaching
  - Patient and Population Health
  - Research
  - Operational and Fiscal Strength

- Key priorities identified through retreats, brainstorming sessions, broad consultation
  - Provides foundation for department and unit planning
FACULTY OF MEDICINE STRATEGIC PLAN

“THE WAY FORWARD” 2010 - 2013

MISSION: Serving Maritime Canada, the Faculty of Medicine enables excellence in health care through our medical education and research programs in partnership with government, health authorities and health care providers.

VISION: To be widely recognized as a national and international leader in medical education and research.

VALUES: Integrity, accountability, social responsibility, evidence-based practices, collegiality, ethics, professionalism.

TACTICS & PRIORITIES

Educating Doctors and Researchers of the Future
Enhancing Patient Care and Population Health
Advancing an Innovative Research Agenda
Organizational, Operational & Fiscal Renewal

LONG TERM VISION STATEMENTS

Best undergraduate medical education in North America • Medical school of the Maritimes – through integrated and distributed learning experiences • Double research funding • Best positive life-long learning and workplace experience • Attract the best learners and trainees

The Faculty of Medicine is committed to Dalhousie’s Strategic Focus 2010-2013
Is the Faculty of Medicine’s strategic plan working? Are we achieving our goals?

Through annual updates, the Faculty of Medicine is monitoring and recording our progress. We are pleased to report our achievements: [http://strategicplan.medicine.dal.ca/documents/Progress-Update-June2012.pdf](http://strategicplan.medicine.dal.ca/documents/Progress-Update-June2012.pdf)
4. What is an environmental scan?

An environmental scan is the foundation of strategic planning. It is a systematic analysis of the external environment to better understand the current and emerging trends and drivers of change that will impact your organization.

At the Faculty of Medicine’s Annual Retreat in October 2012, the following issues were identified. This environmental scan can be used by units and departments for their strategic planning exercises.
5. Why do departments and units need strategic plans? How does it all fit together?
### 6. A 4-step guide to planning at the Departmental and Unit level

**Step 1: Scan**
Assess the internal and external issues impacting your department or unit

#### Internal and External Environmental Scan

- University Strategic Plan
- Threats/Opportunities
- Survey Reports
- Senate Review
- Department Data Profile
- Risk Analysis
- Budget Allocation

**Step 2: Envision**

- Mission...
  - why we exist, what we do
- Vision...
  - a vibrant and compelling image of what we want to create
- Values...
  - the fundamental rules by which we conduct our “business”

**Step 3: Plan**

- Strategic Directions...
  - the major initiatives needed to realize the Vision

<table>
<thead>
<tr>
<th>Strategic Direction and Action Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educating Doctors and Researchers of the Future</td>
</tr>
<tr>
<td>• Organizational, Operational and Fiscal Renewal</td>
</tr>
</tbody>
</table>

**Step 4: Implement**

- Strategic Action Plan...
  - the specific actions needed to “move” the Directions (priority tactics)

- Workplan
- Regular department/unit meetings
- Progress updates/monitoring
- Communication
- Evaluation
7. Considerations for Organizing a Strategic Planning Retreat

While some retreats focus on general dialogue and building a sense of organizational unity, an off-site retreat can also be an excellent mechanism for strategic planning. Some factors to consider in planning a strategic planning retreat:

- Establish the purpose of the retreat (develop criteria to determine if the retreat was successful)
- Working with a facilitator?
  - Facilitation services available through Dalhousie University ([https://www.dal.ca/dept/hr/employee-resources/employee-organizational-development/consulting-services.html](https://www.dal.ca/dept/hr/employee-resources/employee-organizational-development/consulting-services.html))
  - Contact FoM Operations and Policy Unit for planning advice and resources (Associate Dean, Director)
  - If using an external facilitator, seek skilled facilitator with planning expertise in academic sector
  - Facilitator should be aware of the Faculty’s approach to planning (use the FoM template as the foundation document)
  - Note: it is difficult for a retreat participant to also act as a facilitator
- Where to hold the retreat?
  - Offsite retreats more conducive to teamwork; participants less likely to be interrupted and more likely to stay for the entire time
- Record keeping
  - Focus on recording the strategic plan and “actionable items” (vs. traditional minutes)
- Decide who will lead specific tactics and how progress will be monitored
  - Celebrate interim victories; use regular meetings to track strategic progress
8. **Tips from successful planning initiatives**

**Clinical Department: Psychiatry**
- Decentralized clinical department – face-to-face consultation with entire department not feasible
- Combined face-to-face and cyber consultation
  - Department Head developed draft strategic plan, using the FoM template
  - Consulted with executive committee
  - Plan shared with constituent units (TOOL – email); feedback solicited and incorporated into final plan

**Basic Science Department: Pharmacology**
- Utilized external facilitator to guide department through planning retreat
- Prior to retreat:
  - Head met with external facilitator to outline major topics/issues and to design agenda around strategic plan areas - Research, Undergraduate Teaching, Graduate Student and Post-doctoral Trainees, Organization and Fiscal renewal
- During retreat:
  - Overview of FoM and University strategic plan and process provided by Associate Dean, Operations and Policy to ensure alignment
  - Overview of the expected output from the meeting - determine the major strategic plan initiatives
  - Setting priorities for each strategic plan topic
  - Full faculty discussion for each agenda topic - small groups to tackle individual topics and report back
- Following retreat:
  - Facilitator to organize information gathered into a cohesive format that aligns with the University and FoM formats (1 pager)
  - Department Head will edit strategic plan
  - Implement strategic plan with a faculty or staff 'champion' for each major initiative to be undertaken

**Dean’s Office Unit: Continuing Medical Education (CME)**
- Relatively small unit, easier to consult face-to-face with members
- Reviewed “The Way Forward”
- Gathered feedback/evidence from variety of sources (literature review, accreditation, etc.)
- Consulted with stakeholder units
- In-house retreat, led by Associate Dean
9. Attachments/Links

One-page template (FoM)