

Case Will Be Progressively Updated

Transform Existing Planning and Implementation Processes - Starting Immediately

*White Paper/Case Study
School of Pharmacy - Boston, MCPHS*



**The Society for College
and University Planning**

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Context for 2023-28 Strategic Planning

Information on School of Pharmacy - Boston. Massachusetts College of Pharmacy and Health Sciences (MCPHS) was founded by fourteen Boston pharmacists as the Massachusetts College of Pharmacy in 1823. It is the oldest higher education institution in Boston. It has campuses in Boston, Worcester, and Manchester. The School of Pharmacy - Boston is one of the largest Pharmacy education programs in the United States with unexcelled relationships with other educational institutions, the Pharmacy and biological sciences industries, and government. policy makers, and accreditors in the field. They also have excellent connections internationally. In addition to celebrating 200 years, SOP-Boston is the largest pharmacy program in the country and have many other health care programs including PA, PT, OT, optometry, dental hygiene and nursing.

A New Dean with a Vision for the School's Strategic Planning for a Transforming Future. Dean Robert DiCenzo assumed the leadership of The School of Pharmacy-Boston with substantial experience in Strategic Planning At Shenandoah University and other institutions with which he had been associated. He aspired to launch a strategic planning experience to engage the entire SOP-B community - including internal and external stakeholders,. He planned to use the process to engage, motivate, build commitment, and launch the School on a future path in a transforming industry. Working closely with the leaders of MCPHS University, he saw the potential for The School of Pharmacy - Boston to become a recognized leader in innovation and transformational practice.

Selection of Strategic Initiatives as Consulting Partner. In its response to The School of Pharmacy - Boston's RFP, Strategic Initiatives, Inc. expressed it need for a strategy process that puts it on track to deal with dramatic changes in the Pharmacy profession. This requires a process that envisions what the emerging ecosystem for knowledge, work, and learning in the Pharmacy profession will be in 2030 and beyond and positions The School to thrive in that ecosystem.

Strategic Initiatives fielded a team consisting of Donald Norris, Rob Brodnick, Tim Gilmour, Colleen Carmean, and Linda Baer. This Team supported Phase I of the Strategic Planning Project, beginning in August 2022 and resulting in a draft Strategic Plan which was accepted in January 2023. In addition, the SI Team worked in Phase II of the project, which involved constituting the seven- Strategic Initiative Teams (SITs) and helping them complete the seven Expedition Maps for 2023-2028, that would be continuously changed and used to orchestrate transformative change. These Expedition Maps will be accepted in May 2023. The implementation process - which is really about orchestrating transformative change - will be orchestrated from mid-2023 through mid-2028.

Forces for Change Confronting Pharmacy Schools

Environmental Scan Identified Six Key Forces

Societal Shifts in Population – Aging, greater Medicare expenditures, need for hospitals to economize

Investment Spending Will Fuel Innovation – Pharmaceutical R&D and New Health Technology (well being and health care delivery and back office)

Technological Advances in AI, ML, IoT, and Quantum Computing – Enable precision medicine approaches and home/telehealth.

Advancements in Genomics – Cell and gene therapies will transform medicine, using single dose treatments having lasting effects

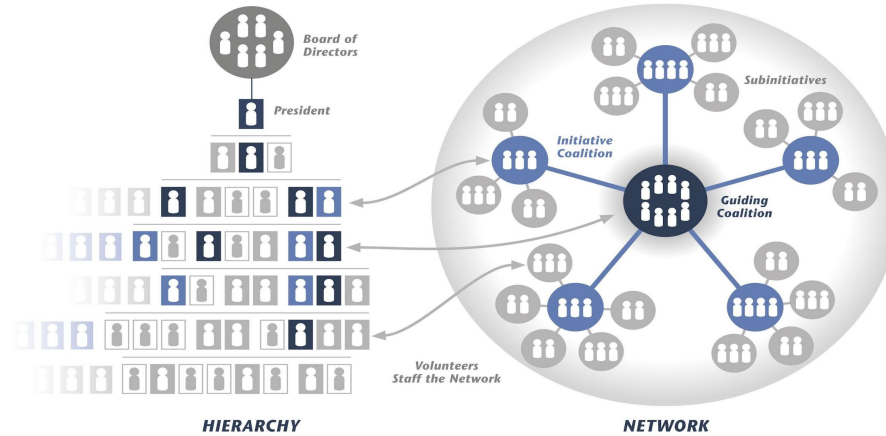
Disruptions over Next Five Years – ¼ of routine primary, emergent, and mental health care will move into virtual or the home. Rather than investing in brick and mortar, companies are investing in technology and buying physician practices to use telehealth and home health delivery and pharmacy services that are direct-to consumer and/or digital.

Disruptions in 20 Years - Move from treatment of disease to cure and prevention and digital diagnostics and therapeutics – made possible through the “smart home.” **Source of Scan: Kevin J. Colgan, “Looking Two Steps Ahead,” University of Chicago Medical Center, American Society of Health-Science Pharmacists, 2021.**

MCPHS’s View: On a global scale and at unprecedented speed, the practice of pharmacy, healthcare and the life sciences industry is changing and adapting. New thinking in ethical, technical, and visionary healthcare practice and careers in the life sciences industry is now being demanded of our graduates. In response, the School of Pharmacy - Boston has chosen to take on the transformational work of defining and delivering new standards of practice and health sciences education. Daily, our faculty, students, and alumni are engaged in shaping this future (Excerpt from Introduction to Strategic Plan 2023-2028).

Two-System Model to Enable Transformation

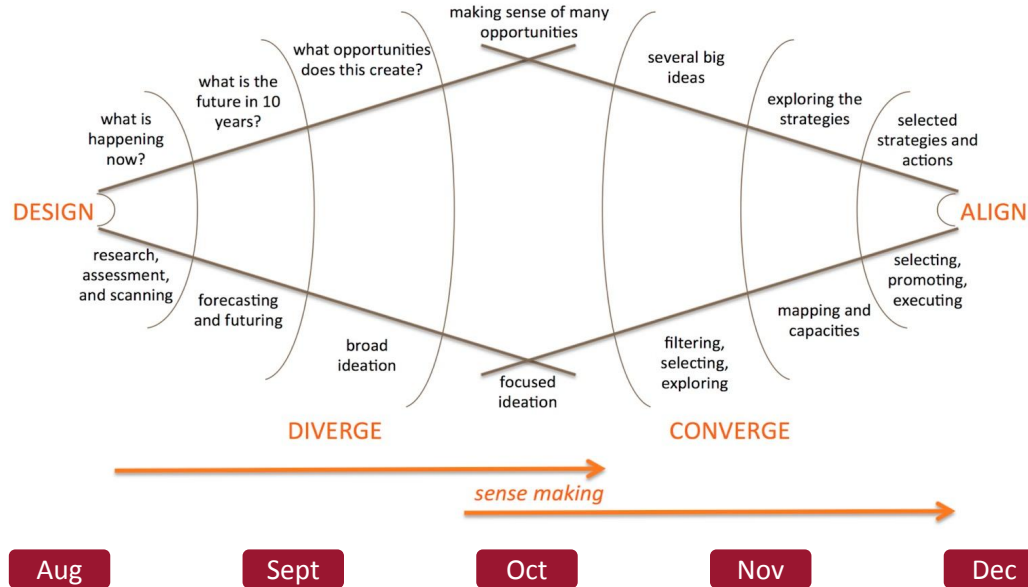
Two Systems, One Organization



Kotter Organizational Model	MCPHS Version
<p>Hierarchy - Execute Action Plans, Individuals Serve on Guiding Coalition and Initiative/Coalitions</p> <p>Guiding Coalition - Perform Strategic Planning, Provide Integrating Oversight</p> <p>Initiative Coalitions - One for Each Strategy, Draw in Other Individuals with Expertise</p>	<p>MCPHS Organizational Structure - Execute Action Plans, Individuals Serve on Teams</p> <p>Strategic Direction Leadership Team (SDLT) - 10 People, Perform Strategic Planning, Orchestrate Change</p> <p>Seven Strategic Initiative Teams (SITs) - 30-40 People, Focus on Individual Strategic Initiatives</p>

Planning Process Design

design → divergent thinking → convergent planning → alignment



The Strategic Planning Process was designed incorporate the principles and practices of design thinking. It was scheduled create a draft strategic plan and first draft expedition maps by the end of December 2022. In early 2023, the strategic plan would be refined and ratified. In addition, phase II would flesh out the Expedition Maps by May 2023 and proceed to orchestrate transformational change from 2023 through 2028.

Planning Process Design - Continued

<u>Date(s)</u>	<u>Design Stage – Session Type</u>	<u>Experience</u>	<u>Output</u>
July 25/Aug 1	Design – Collaborative Design	Virtual design meetings held virtually to set the project in motion, determine kick-off event details, and identify key issues for futuring papers	Schedule and Facilitation Guide
Aug 18 10am-3:30pm	1 - Design – Planning Kick-Off Event (futuring)	Live event in Boston where Don and Tim visit to set planning team in motion at the kick-off event, Rob, Colleen, and Linda join remotely for short visits	High energy, understand the planning process, begin futuring
Aug 25	Design/Diverge – Futuring Papers	Faculty begin work to identify current and future forces and potential opportunities at the retreat, then complete their idea capture within a week	Forces + Opportunities from the white papers to seed ideation
Sept 7 3-5pm	2 - Diverge – Opportunity Ideation (ideation)	Open and engaging virtual ideation session to build on the futuring Opportunities and to generate additional ideas to support Strategy Crafting	Large Number of Opportunities
Sept 15 3-5pm	3 - Diverge – Opportunity Ideation (ideation)	Open and engaging virtual ideation session to build on the futuring Opportunities and to generate additional ideas to support Strategy Crafting	Large Number of Opportunities
Sept 29 12-2pm	4 - Diverge – Opportunities to Big Ideas (big idea themes)	Smaller virtual session with the planning committee and others to add resolution to evolve the many Opportunities to a fewer number of more focused Big Ideas	Fewer Big Ideas with More Detail
Oct 11 12-2pm	5 - Converge – Convergence with Leadership (strategic structures)	Virtual sensemaking with the planning committee, executive team, and potentially others to cluster Big Ideas as the process moves from Divergence to Convergence	Focused Big Ideas
Oct 25 12-2pm	6 - Converge – Big Ideas to Strategies (strategy crafting)	Further virtual convergence by selecting the best of the Big Ideas to Craft Strategies	Initial Strategies
Nov 8 12-2pm	7 - Converge – Strategy Crafting (expedition maps)	Virtual working session with several small teams to begin crafting Strategies as Strategic Expeditions	Focused Strategies
Nov 22 12-2pm	8 - Align – Strategies and Values (strategic initiatives)	Inspecting the expedition maps and evaluating the strategic initiatives before finalizing. Begin work on the key values.	Review Strategic Initiatives
Dec 9 10am-12pm	9 - Align – Writing Workshop (strategic statements)	Collaborative virtual working session with a subset of the planning committee as a writing team with consultants to draft Mission-Vision-Values-Strategies	Drafts of Strategic Statements
Dec 16 12-2pm	10 - Align – Strategic Plan Finalization (final drafting)	Virtual meeting to review of the Strategic Documents and Strategies with the Planning Committee with further work by the writing and consulting teams	Draft of Strategic Plan
Dec TBD	Debrief	Virtual session with Leadership/Consultants to review outcomes – plan Phase II	Plan for Phase II -Orchestration

Deploy Virtual Engagement Layer and Reinvented Planning Tools

Collaboration
Zoom

Creativity
Miro

Analytics & AI
you pick

Virtualized Engagement Layer, Fully Integrated

Build Miro Boards to incorporate the Planning Tools Reinvented for Planning in Turbulent Times

Plan from the Future Backward

Collaborative Group Ideation, Craft Expeditionary Strategies

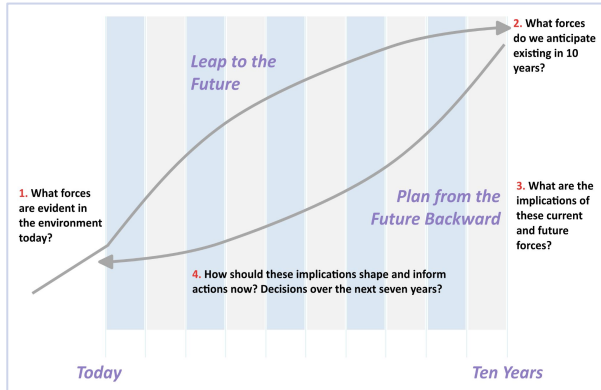
Build Expedition Maps

Use Expedition Maps to Orchestrate Transformation

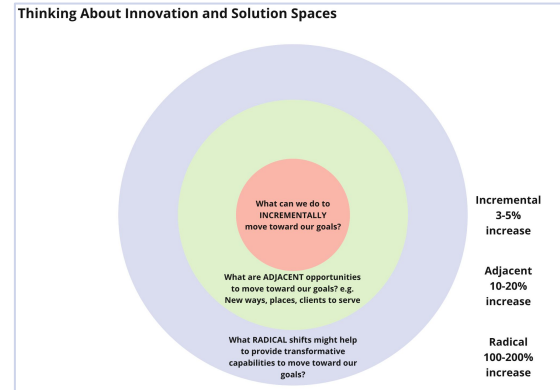
Reinvented Planning Tool Layer

The Pharmacy School-Boston used an Integrated Engagement Layer and Four Planning Tools that have been reinvented to deal with planning in turbulent times. How these tools changed the dynamics and outcomes of the planning experiences is described in the next series of slides.

Key Tools for Planning and Orchestration Processes



Planning From the Future Backward



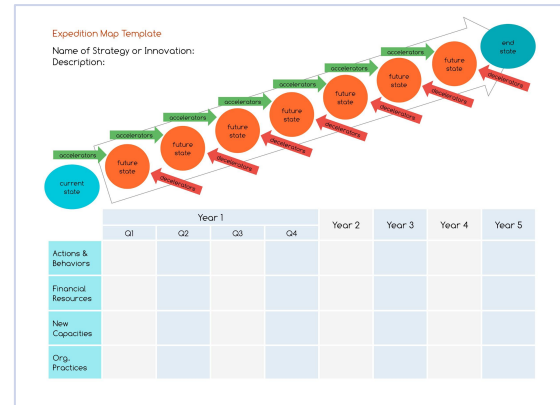
Collaborative Group Ideation

Crafting Strategies through the Design Process

Opportunities → Big Ideas → Strategies

- | | | |
|--|---|---|
| 1. reactive: recognized due to the changing environment | 1. proactive: recognizes the changing environment | 1. expeditionary: adaptive to changing environments |
| 2. very broad or very specific | 2. works across all partners | 2. linked to each partner w/ accountability |
| 3. interesting (maybe) | 3. compelling (always) | 3. clear & executable |
| 4. value undetermined | 4. creates value | 4. measurable value/outcomes |
| 5. favorable circumstance, but may not help people focus | 5. serves as a focal point of effort | 5. focuses behavior over an extended period of time |

Strategy Crafting



Expedition Mapping

Changing the Dynamics of the Planning Process

We used the Miro whiteboard product to dynamically and consecutively array all of the elements of our planning and orchestration processes and to maintain a record in the cloud, available to participants throughout the duration of the processes. In addition, we changed the dynamics of a standard planning process in the following ways:

- Deployed facilitators trained in both our planning and virtualization tools. They facilitated working sessions with the planning teams and worked on the Miro board materials between sessions. Rather than half-day or full-day face-to-face planning sessions, we convened the planning teams in two-hour virtual working sessions, with a week or two between sessions. The strategic planning process and draft plan were completed in 11 two-hour sessions. We found we could complete such strategic planning processes in half the calendar time and cost of traditional, face-to-face processes.
- Participants used conversation and sticky notes to contribute to the various planning exercises. exercises and capture inputs. The two-hour sessions were broken up into a combination of presentation, conversation, and highly active work sessions. The facilitators worked on and improved the work products between sessions. The individual members of the planning team could also revisit and improve their work products between meetings. The Miro Board became a running account of all working sessions and changes made between sessions.
- The planning team assumed greater ownership as the process progressed. The members were given time between sessions to refine their work product and develop their skills in operating in the virtual engagement environment. During the process, planning teams identified opportunities, clustered them into big ideas, then synthesized those into 5-7 strategies. These strategies were synthesized and refined by the facilitators and members of the planning team. As the process progressed, we discovered how to use analytics and generative AI to improve the written text, construct strategies, and synthesize final writing in the Strategic Plan document.
- The individual strategies were incorporated into a short strategic plan, including a one-page graphic summarizing mission, vision, core values, and strategies. The dynamics of the experience and outcomes were also substantially better and far more suited to the challenge and opportunities facing institutions in turbulent, transformative times.

Changing the Dynamics of the Planning Process - Continued

- Moving from strategic plans to implementation, we formed multiple teams, one associated with each strategy. They were called Strategic Initiatives Teams (SITs). Other working groups were planned to emerge over time to help with futuring, analysis, and synthesis and to focus on issues they may arise.. We referred to the Phase II process as *orchestration of transformative change*, rather than *implementation of a strategic plan or action plan*.
- These teams built expedition maps, which were subsequently used to orchestrate transformative change over time. Each expedition map combined information on 1) specified desired future states, 2) accelerators and decelerators, 3) financial resources needed, 4) organizational capacities to be acquired, 5) targets and outcomes, and 6) required changes in culture.
- The expedition maps were progressively refined to take account of both aspirations and organizational capability. They refined the expectations for what could be achieved in particular terms and years. The expedition maps were then continuously updated in response to changing environmental conditions and trends. They became part of the implementation process, which we came to call “orchestrating transformation” - a better description fitting the times.
- The expedition maps were available in real-time throughout the course of the orchestration. They could be adapted continuously to capture new changes in the environment, evolving views of the future, and reassessments of the institution’s capacity to achieve the outcomes and metrics established for particular timeframes. A strategic initiative team was associated with each expedition throughout the orchestration process, collaborating with the leaders and staff responsible for operational action planning and execution of each strategic initiative.

Final Strategic Plan

The Strategic Plan was completed by December 30, 2022 and approved by mid-January. It is 8 pages long. The first page provides a one-page summary which communicates a serious, transformative intent:

- It links mission, seven interconnected strategic initiatives, vision, and core values.
- The mission statement commits to helping students, alumni, faculty, and external stakeholders to achieve success in dramatically transforming professions.
- The vision aspires for The School of Pharmacy to be a recognized leader in healthcare and life sciences education, known for a commitment to innovation and transformational practice.
- The seven strategic initiatives are interconnected and the verbiage for each of the seven demonstrates the linkages between them.
- The statement of core values sets higher values and goals beyond personal academic success and professional attainment.

The Expedition Maps for the seven strategic initiatives will contain the details that will drive the action plans undertaken by the School's organizational hierarchy.

School of Pharmacy—Boston Strategic Plan 2023-2028

Mission:

We are a student-centered learning community that educates diverse, team-based leaders in transforming healthcare and life sciences industries. We help our students, alumni, faculty, and external stakeholders achieve success in the dramatically transforming professions of today – and tomorrow.

Seven interconnected Strategic initiatives will be orchestrated to achieve the School's mission, vision, and financial sustainability.



Core Values:

As a community we value collaboration, personal and professional development, integrity, inclusion and diversity, knowledge, and a commitment to making a positive impact in the world.

Leadership Uses Expedition Maps to Orchestrate Change

Using the Expedition Maps

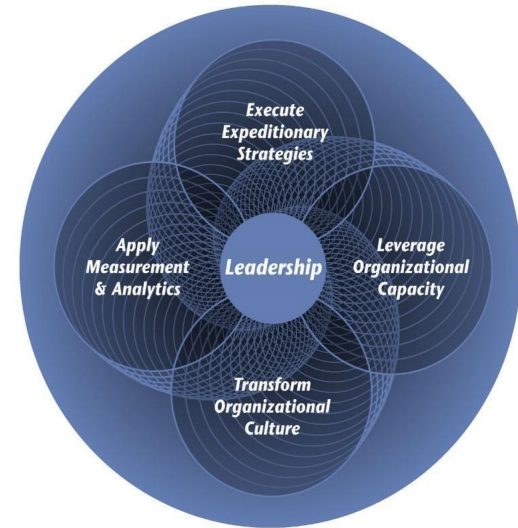
Phase II of the Strategic Planning initiative focused on constituting the seven Strategic Initiatives Teams (SITs) and then facilitating the efforts of the seven teams taking the first drafts of the Expedition Maps from Phase I and fleshing them out to complete the drafts. Slide 12 on the next page portrays a sample Expedition Map from SIT#1, Pharmacy Curriculum Assessment and Improvement. It illustrates how the team organized sticky notes to capture their work and comments offered by the Dean to the Team.

Once the seven Expedition Maps were completed by the SITs, the Strategic Direction Leadership Team compared the seven initiatives and made suggestions on refining the initiatives to reflect the resources available to the School, scaling back some tasks and extending the period of performance for others.

Then the Expedition Maps were turned into Action Plans for the first year of the project, These were taken over by the Organizational Hierarchy to execution. The SITs continued to oversee the progress of orchestration of their Strategic direction, identifying new and changing forces and trends, and suggesting changes in the Expedition Maps.

Near the end of the first year the SITs met to create the Expedition Map entries for the next year. The SDLT met to review and refine these suggestions and create the Action Plan for the Next Year, which would be reviewed and executed by the Organizational Hierarchy.

Orchestrating Transformative Change



STRATEGIC INITIATIVES ©2021

Miro Stories – Expedition Mapping

Strategic Initiative: **Strategic Initiative #1: Pharmacy Curriculum Assessment and Improvement**

Strategic Initiative Team (SIT) Expedition Guide(s):

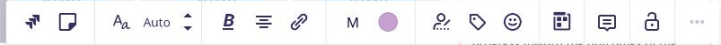
- name of expedition guide 1
- name of expedition guide 2
- Strategic Initiative Team (SIT) Additional Members:
- name of team member
- name of team member
- name of team member
- name of team member
- name of team member

ACTIONS	2023			2024			2025	2026	2027
	Spring	Summer	Fall	Spring	Summer	Fall			
<p>ACTIONS List any and all activities that must be completed during the specific time interval. Consider sequencing over time as well as resource and employ capacities.</p>	specific action specific action	specific action specific action	specific action specific action	specific action specific action	specific action specific action	specific action specific action	specific action specific action	specific action specific action	specific action specific action
<p>RESOURCES What resources are required to complete the above actions? Consider current funds, new expenditures, positions, and technologies.</p>	\$\$\$ and other resource to support the action \$\$\$ and other resource to support the action	\$\$\$ and other resource to support the action \$\$\$ and other resource to support the action	\$\$\$ and other resource to support the action \$\$\$ and other resource to support the action	\$\$\$ and other resource to support the action \$\$\$ and other resource to support the action	\$\$\$ and other resource to support the action \$\$\$ and other resource to support the action	\$\$\$ and other resource to support the action \$\$\$ and other resource to support the action	\$\$\$ and other resource to support the action \$\$\$ and other resource to support the action	\$\$\$ and other resource to support the action \$\$\$ and other resource to support the action	\$\$\$ and other resource to support the action \$\$\$ and other resource to support the action
<p>PEOPLE What is required of the school's infrastructure, people, and/or processes to complete the actions? Include any required change in training, policies, culture, or behavior.</p>	key staff to accomplish action supporting institutional changes	key staff to accomplish action supporting institutional changes	key staff to accomplish action supporting institutional changes	key staff to accomplish action supporting institutional changes	key staff to accomplish action supporting institutional changes	key staff to accomplish action supporting institutional changes	key staff to accomplish action supporting institutional changes	key staff to accomplish action supporting institutional changes	key staff to accomplish action supporting institutional changes
<p>METRICS For this specific time interval, what measures do you expect to change, from what to what?</p>	measure to track progress	measure to track progress	measure to track progress	measure to track progress	measure to track progress	measure to track progress	measure to track progress	measure to track progress	measure to track progress

OUTCOMES
Identify the primary outcomes to be attained by the time the strategy is completed. Are metrics included on the left that give evidence for outcome attainment?

ACCELERATORS
List a few of the forces, either internal or external, that could serve to speed up progress toward the outcomes of the strategy.

DECELERATORS
List a few of the forces, either internal or external, that could serve to slow down progress toward the outcomes of the strategy.



Orchestration: A Work in Progress - Expedition Maps Will be to be Regularly Updated

We plan to regularly update this case to capture the progress on Orchestration. This will include:

- Use and refinement of the Expedition Maps
- Quarterly and annual refinements and generation of one-year Action Plans
- Functioning of the SITs, the SDLT, and the Organizational Hierarchy
- Formation of additional working groups or teams
- Engagement of external partners, collaborators, and stakeholders
- Fresh insights on outcomes and changes in the Strategic Planning and Orchestration processes

Periodically check the Website for updates. We will also post announcements of changes to this case study and others on our blog. The URLs for this case study and other resources in our body of knowledge are located on slide 18.

Conclusions about the Tools and Processes

Virtual Whiteboard Provides a Canvas Where the Paint Is Always Wet. The virtual White Board captures an easily accessible chronological history of all of the inputs, conversations, and outputs of the strategic planning and implementation processes. During strategy crafting, this enabled views of the future and strategies to be rapidly prototyped and continuously refined. This both accelerated the process and elevated the quality of the strategies. The continuously changing expeditionary strategy maps were used to turn implementation into the orchestration of transformative change --- weaving together strategic actions, building organizational capacity and leadership talent, changing behaviors and culture, and achieving measurable targets.

Actively and Deeply Engage Larger Communities. From the start, we observed that the deployment of these suites of collaborative tools leads to better use of participants' time, much more meaningful participation by all involved, and greater buy-in. Moreover, transformative change requires the active and continuing engagement of hundreds of participants across the institution. Virtualized processes, supported by analytics and Generative AI (GAI), are essential to enlisting such an army of participants in transformation.

Reach Out to External Partners and Stakeholders. As institutions diversify their offerings and modes of learning to become the new breed of learning enterprise required by 2030, they will involve more partners and collaborators. Our virtualized planning ecosystem has proven adept in involving such collaborators in strategy crafting and orchestration and building insight and buy-in. Moreover, these virtualized tools have been used to include participants across multicampus systems to collaborate in ventures that have proven impossible using traditional planning processes and means of engagement.

Conclusions About the Tools and Process - Continued

Facilitate Active Orchestration of Transformation. To actively orchestrate transformation without a virtualized platform would be impossible. The combination of managing through expedition maps, continuously refining, tracking accomplishments and “early wins,” and charting changes in behaviors and culture requires the sort of data and analysis capacity provided by the Miro board supported by analytics and Generative AI (GAI).

Deploy Generative AI Throughout the Planning and Orchestration Processes. We have already used GAI in our suites of new tools to facilitate writing and synthesis and to summarize session notes in record time. We are now preparing to use GAI to brainstorm, facilitate strategy crafting, analysis, and execute new projects – and enhance productivity and performance. The Miro board-based record can be accessed by GAI to generate enhanced/revised strategies that reflect changing conditions and identify necessary interactions between strategies.

Generate Images to Maximize Visualization. Humans process visual images 40% faster and better than text. Therefore, we plan to use analytics and AI to dramatically increase the use of visualization, on a continuing basis, throughout planning for and orchestration of transformation, using the virtual engagement layer as the platform.

Contact and Access to Body of Knowledge

Contact

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Body of Knowledge

Information on Transforming for Turbulent Times - www.strategicinitiatives.com

Case Studies on Transforming in Turbulent Times - www.strategicinitiatives.com/casestudies

Case Study on Boston Pharmacy School - www.strategicinitiatives.com/schoolofpharmacyboston

