BSI - Strategic Foundations Session

July 12, 2016 (Half-day training)

July 25 - 26, 2016 (Two-day workshop)

**THEME TEAM REPORT OUT**
Nine Steps Development Process and Flow Schedule for Tier 1

**Strategic Management Team**

**Steps 1-2**
- Mission, Vision, Core Values, CVP, Strategy Profiles, Perspectives, Themes & Results

**Steps 3-4**
- Organization-wide Strategy Map
- Theme Strategy Maps

**Steps 5-6**
- Prioritization and Final Scorecard Review

**Strategic Theme Teams**

**Objective Owner Teams**

**Steps 5-6**
- Performance Measures and Initiatives

**Customer Loyalty**
## REVISED Upstate Strategic Themes and Results

**July 25 – 26, 2016**

<table>
<thead>
<tr>
<th>Strategic Themes</th>
<th>Strategic Results</th>
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</thead>
<tbody>
<tr>
<td>Integration</td>
<td>One university, connected by mission and aligned leadership, integrated through a culture of inclusion, transparency, and trust</td>
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<tr>
<td>Innovative Learning and Discovery</td>
<td>Destination of choice for patients and innovative employees, educators, learners and researchers</td>
</tr>
<tr>
<td>Community Impact</td>
<td>A collaborative and trusted partner in service to our communities</td>
</tr>
<tr>
<td>Execution and Growth</td>
<td>An excellent university growing through aligned decision making, efficient, effective operations, quality services, and a dedicated and diverse workforce</td>
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</tbody>
</table>
Integration DRAFT Strategy Map

“One university, connected by mission and aligned leadership, integrated through a culture of inclusion, transparency, and trust”

Learners, Patients, Community, & Other Stakeholders
- Improve Satisfaction
- Improve Achievement of Upstate’s Mission
- Increase Access

Financial Stewardship
- Improve Cost Efficiencies
- Increase Net Profitable Growth

Internal Processes
- Increase Transparency of Process & Results
- Improve Alignment of Resources with Mission-Based Priorities
- Improve Joint Planning & Collaboration
- Reduce Barriers to Operational Integration

Organizational Capabilities (People, Facilities, Technology)
- Increase Inclusion
- Improve Culture of Trust
- Increase Employee Satisfaction
- Increase Accountability
- Increase Alignment

July 25 – 26, 2016
Innovative Learning and Discovery (DRAFT) Strategy Map

“Destination of choice for patients and innovative employees, educators, learners and researchers”

**Learners, Patients, Community, & Other Stakeholders**

- Improve Patient & Community Outcomes
- Improve Learner Engagement & Achievement
- Increase Research Excellence
- Strengthen Reputation

**Financial Stewardship**

- Increase Financial Resources
- Increase Innovation Across our Missions

**Internal Processes**

- Increase Efficiency & Productivity
- Improve Creative Collaboration
- Improve Communication About Innovation

**Organizational Capabilities (People, Facilities, Technology)**

- Strengthen Strategic Investment in Technology and Facilities
- Improve Support Services Across the Institution
- Increase Access & Inclusion
- Increase Recruitment, Empowerment & Retention of Innovators
- Expand Culture of Innovation

July 25 – 26, 2016
Community Impact DRAFT Strategy Map
“A collaborative and trusted partner in service to our communities”

Learners, Patients, Community, & Other Stakeholders

- Improve Community Access
- Improve Health Outcomes & Reduce Disparities
- Improve Community Perception & Trust

Financial Stewardship

- Increase Available Resources Through Partnerships
- Improve Cultural and Social Knowledge and Practices
- Increase Community Service & Giving

Internal Processes

- Strengthen Community Partnerships
- Increase Equity Through Shared Decision-Making
- Improve Coordination & Alignment of Existing Initiatives

Organizational Capabilities (People, Facilities, Technology)

- Increase Resources for Community Initiatives
- Increase Diversity of Leadership, Workforce, Students
- Improve our Understanding of Community Needs
- Improve Cultural and Social Knowledge and Practices

July 25 – 26, 2016
Execution and Growth Draft Strategy Map

"An excellent university growing through aligned decision making, efficient, effective operations, quality services, and a dedicated and diverse workforce"

Learners, Patients, Community, & Other Stakeholders

Financial Stewardship

Internal Processes

Organizational Capabilities (People, Facilities, Technology)

July 25 – 26, 2016
BUILD A ROADMAP FOR THE FUTURE

NEXT STEPS
Nine Steps Development Process and Flow Schedule for Tier 1

Strategic Management Team

- Steps 1-2: Mission, Vision, Core Values, CVP, Strategy Profiles, Perspectives, Themes & Results

Strategic Theme Teams

- Steps 3-4: Theme Strategy Maps

Objective Owner Teams

- Steps 5-6: Prioritization and Final Scorecard Review

Performance Measures and Initiatives

- Customer Loyalty

Steps 5-6: Performance Measures and Initiatives

July 25 – 26, 2016
Creating Enterprise-wide Strategic Objectives from the Theme Objectives

<table>
<thead>
<tr>
<th>Theme 1</th>
<th>Theme 2</th>
<th>Theme 3</th>
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<tbody>
<tr>
<td>Customer &amp; Stakeholder</td>
<td>Financial/Stewardship</td>
<td>Internal Process</td>
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<td>Organizational Capacity</td>
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Tier One Strategy Map

<table>
<thead>
<tr>
<th>Customer &amp; Stakeholder</th>
<th>Measures</th>
<th>Targets</th>
<th>Initiatives</th>
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EXAMPLE Tier 1 Strategy Map

- **Customer & Stakeholder**
  - Improve Quality of Life
  - Improve Program Outcomes
  - Improve Awareness & Accessibility of Services
  - Increase Economic Abundance
  - Increase Safety & Security
  - Improve Internal Efficiency & Effectiveness
  - Improve Quality of Life

- **Financial Stewardship**
  - Reduce Waste
  - Improve Land & Asset Management

- **Internal Process**
  - Improve Law Enforcement
  - Improve Delivery of Services
  - Improve City Promotion/Marketing
  - Improve Internal Efficiency & Effectiveness

- **Organizational Capacity**
  - Increase Quality of Staff
  - Improve Utilization of Technology
  - Improve Community & Economic Partnerships

**July 25 – 26, 2016**