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## Designing a Strategic Plan for the Jefferson Center for Interprofessional Practice and Education (JCIPE)

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## Opportunity, Premises and Approach

In Fall 2017, the Associate Provost asked the director of the Doctor of Management in Strategic Leadership (DMSL) program to discuss with the co-directors of JCIPE their need for a strategic plan in support of JCIPE's 10-year anniversary. As the DMSL education model included applied experiential consulting projects (DMSL had developed strategic plans for another Jefferson Center and external organizations) and as there was no financial cost for JCIPE, the project was formally agreed-upon. It began with JCIPE issuing a restricted Request for Proposal (RFP) for the design of a business model and three-year strategic plan.

Two premises were held by DMSL. First was that the context in which JCIPE operated was volatile, often uncertain, complex, ambiguous (VUCA), non-linear and dynamically interactive. This meant the development of a strategic plan was a complex system problem. The second premise informed by the first was that the appropriate pathway for this type of challenge was a systems-informed design methodology. This would enable development of the strategic plan from process consulting that applied a 3<sup>rd</sup> generation stakeholder-based design methodology (Barabba, 2004).

The educational approach was to embed overlapping project activities into three doctoral courses in Spring 2018 and a follow-up course in Summer 2018. Students were informed of the opportunity then chose to register in Spring for Strategic Interactive Planning/Idealized Design (SIP/ID), Theory of Constraints (TOC), and Strategic Organization Development and Change (SODC) and Special Projects in Summer. Teaching Faculty and JCIPE leadership communicated regularly to ensure shared understanding of the project activities and education processes.

## Stakeholders and Methodologies

**Stakeholders:** JCIPE identified 127 stakeholders including Center leadership, staff advisors, deans, faculty, student learners, community leaders, health mentors, and patients. All participated directly or indirectly in the design project.

**Methodologies:** Two methodologies were carried out in parallel. The TOC course team began with the premise that JCIPE could meet its currently defined purposes and interests if conflicts and barriers were eliminated or reduced. The team examined how the organizational systems of JCIPE were interconnected, interdependent and affected the purposes of Jefferson as a whole organization. Via research and interviews, the team analyzed possible physical, policy or cultural constraints that impose upon JCIPE's success, and searched using sufficient cause thinking to identify potential root causes. The core methodology used TOC tools; namely, Undesirable Effects, Current Reality Tree and Evaporating Cloud, from which the team determined assumptions and used interpolations to narrow the scope to arrive at a likely root cause.

The SIP/ID and SODC course teams also assumed a systems perspective. Their approach began with a formulation of the current reality, i.e., a deep understanding of JCIPE from its inception to the present. This involved a Systems Analysis, i.e., a comprehensive evaluation of JCIPE's mission, functions (and deliverables) it performs in order to achieve that mission, processes it applies, and structure/governance and business model applied to manage the complexity of academic organizational life as a component of the larger university system in which it exists. The result was intended to produce a full understanding of JCIPE's situation, problems and opportunities, and an appreciation that without redesign, future survival was not assured.

The SIP/ID summer team prepared then applied Idealized Design methodology. In June, all stakeholders were invited to attend half-day workshops to design an "ideal Center for Interprofessional Practice and Education (CIPE)." As part of the process, stakeholders were prompted to imagine that JCIPE had been completely destroyed, there was nothing to improve or change, and it was their opportunity to describe the properties and specifications they wanted for an ideal CIPE if they could have anything desirable, feasible and viable in the current environment without resource restrictions. The ideal CIPE required a mission, functions, processes, structure/governance, and revenue model.

In July, following collection, synthesis and alignment of the design elements, an Interim Report was sent to stakeholders who returned additional comments to the SIP/ID team. Via multiple meetings with JCIPE leadership, the results were incorporated into the Final Report which contained the strategic plan.

## Results

From the three spring courses offered, DMSL assigned to the project 4 faculty and 32 doctoral students. From the summer course, 3 faculty and 6 doctoral students participated all of whom were in the spring courses. The project ran from January 10 to August 3, 2018.

The TOC approach examined why the organization's goal which for this project was to be the "premier CIPE" was not adequately met. The approach analyzed/deconstructed current operational and other events and outcomes to reach root causes that could be eliminated or changed. The methodology identified 14 significant undesirable effects and a root problem: the need by JCIPE to present to its stakeholders evidence-based data that support its need to obtain necessary funding and establish its position as a credible IPE leader. The recommendation was for JCIPE to consider a program champion who would advocate on its behalf and bridge the crucial gap between one-Jefferson key leadership and key stakeholders.

The SIP/ID approach examined JCIPE's history and current reality in order to gain a comprehensive understanding of the "mess" defined as complex systems of changing problems that interact with each other (Ackoff, 1981). According to SIP/ID theory and practice, for a complex problem such as this identifying and addressing root causes will not solve it. Rather, the system must be redesigned so that problems can be dissolved, i.e., the new design would create conditions such that the problems cannot exist.

The Idealized Design workshops generated more than 100 elements for an ideal CIPE beginning with a new mission: To generate and sustain an adaptive "living laboratory" for innovative interprofessional practice and education that improves the lives of patients and populations. This aligned with the University mission and illustrated JCIPE's adaptive capacity where stakeholders are immersed in a learning environment and innovative solutions are co-created across Jefferson and beyond to improve health for all.

The properties collected by stakeholders led to three primary goals in the Strategic Plan: 1. Enhance the local impact of JCIPE in the Thomas Jefferson University academic and clinical enterprise; 2. Increase the national and global visibility and reputation of JCIPE; and 3. Increase opportunities by diversifying revenue streams for JCIPE. From these, sets of Action Items were described which would be implemented. Table 1 provides the example of Objective 1.

Table 1. Action Items for Strategic Objective 1: Enhance the local direct impact of JCIPE in the Jefferson academic and clinical enterprise

Deliver high quality IPE curricular programming across the learning continuum (e.g. classrooms, simulation & practice settings)

- ❖ Increase support of Complex Care Curriculum - 3C - Director
- ❖ Hire 3C Program Leads
- ❖ Increase support of Virtual Reality Program Manager
- ❖ Hire Virtual Reality Program Coordinator
- ❖ Hire Program Assistant

Expand number of health professions, academic majors, and campuses participating in JCIPE programming

- ❖ Obtain larger conference room
- ❖ Obtain five new offices
- ❖ Establish East Falls JCIPE office
- ❖ Obtain training space

Enhance academic profile of the University by attracting and supporting students & faculty who role model inter-professionalism (e.g., transcript designation, faculty development track)

Expand the number of clinical providers/entities participating in JCIPE programs to optimize team-based care delivery (e.g. TeamSAFE, faculty development)

Monitoring of the plan's implementation would be conducted through quarterly reviews by the "Strategic Planning Committee" to assure: timely accomplishment of planned strategic actions and evaluation of their effectiveness in achieving the desired outcomes; assessment of possible revisions in strategy to improve effectiveness; and consideration of changes that may be dictated by alterations in the professional or community environment. As the Strategic Plan similar to JCIPE is a dynamic "living document" as the fourth year approached, a re-evaluation and updated redesign would begin.

## Outcomes

The principal results from the TOC team were presented as a student paper on the Jefferson Libraries Digital Commons co-authored by Professor Larry Hirschhorn and doctoral students John Ervin, Paula Smith-Benson and Pamela Tull (Hirschhorn et al, 2018). The Final Report including the Strategic Plan were presented as a faculty paper on the Jefferson Libraries Digital Commons co-authored by JCIPE leadership, DMSL faculty, and six doctoral students three of whom co-authored the TOC paper (Collins, et al, 2018).

In the 2018 Annual Report "Reflections and Future Directions" published by JCIPE, a full page was devoted to the project, design sessions and implementation activities including the updated mission, newly brought-in staff and faculty, and the many changes in functions, processes and structure informed by the Strategic Plan.

Anecdotally, in a search in 2020 for a colleague at Jefferson about a project, the DMSL Director was informed that his colleague's appointment as Assistant Professor in the Psychology Department changed to JCIPE's Director of Assessment, Evaluation & Research. This was accompanied by email that included: "That was a fun process. It led to my position being created!!!"

As students in DMSL approach the dissertation, the education process shifts from andragogy (self-determined learning) to heutagogy (self-directed learning; see Hase & Kenyon, 2013). Independently, Pamela Tull, a doctoral student who was in the TOC and SIP/ID teams, created a process for collecting, evaluating and optimizing the characteristics of Idealized Design workshop facilitators that improved the generation of properties collected for the design by stakeholders. From this research she completed her dissertation for the Doctor of Management in Strategic Leadership as well as a follow-up degree, the Doctor of Philosophy in Complex Systems Leadership.

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## Notes and Contact

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