

Strategic Planning Retreat for Healthcare Innovation

Organization Profile

Name: UMass Memorial Health Division of Vascular and Endovascular Surgery

Industry: Healthcare

The UMass Memorial Health Division of Vascular and Endovascular Surgery (Division) is one of the leading vascular and endovascular practices in the United States focused on clinical, educational, and research excellence. The Division is deeply committed to patient care while pursuing consistent innovation in its field. For example, the UMass Memorial Center for Complex Aortic Disease (CCAD) is internationally recognized for its multidisciplinary approach for achieving outstanding patient outcomes.

In collaboration with the Division, Balanced Growth worked with the team of surgeons, nurse practitioners, and clinical coordinators on a strategic plan for the future of the division.

During this process, BG interviewed the team members of the Division, administered a survey, reviewed extensive background information, and conducted a strategic planning retreat. Together, BG and the Division worked to create a strategic plan to guide the next stage of growth and excellence for the Division.

Surveying & Interviewing the Team

After reviewing historical documents provided by the Division from previous strategic planning sessions, the BG team crafted a survey to identify trends in perceptions of various stakeholder groups that could benefit the strategic planning process. The survey utilized the key elements of a SWOT analysis in order to assess both the internal and external factors that could impact the goals of the Division. This survey was distributed via email to team members of the Division and was completed prior to the Retreat. BG also conducted a pre-retreat visit to UMass Memorial to attend the Division meeting and conducted in-person interviews with team members.



“A commitment to strategic planning has been a key component of our division’s success over the last 15 years. Transitioning to work with BG as our strategic planning retreat facilitator was seamless and rewarding. Jason and his team kept us laser focused on our mission and pushed us to achieve more while making sure that everyone on our team felt valued and was heard.”



Dr. Andres Schanzer, MD

Director, The Division of Vascular and Endovascular Surgery at UMass Memorial Health



*The Division of Vascular and Endovascular Surgery
(Photo from UMass Chan website.)*

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Synthesizing Survey Results

After collecting the the survey, the BG team organized and analyzed the the raw data. By synthesizing the data into meaningful conclusions, the BG team was able to present findings in an organized and accessible manner, ensuring that the findings were accurately understood and applied. This process helped to facilitate the effective communication of survey results while at the retreat. All retreat attendees were given a participant notebook that included anonymized versions of both the raw data and the synthesized insights

The Retreat

The BG team put together the agenda and corresponding materials for this 2-day retreat. The first day included reviewing the Division's mission, vision, and values; discussing the current state findings and the survey results; and looking at the Division's aspirational goals, potential innovations, and strategic planning priorities. Day one concluded with a breakout session into small, domain-focused groups.



The Division's Strategic Planning Retreat was held at the Cyprian Keyes Golf Club in Boylston, MA.

The second day of the retreat was geared towards the future: prioritizing and refining strategic goals; selecting strategic priorities, and developing a high-level action plan.

The Action Plan

An initial action plan was created for each key initiative. Each of these action plans uses the SMART Goals framework, meaning the goals are specific, measurable, achievable, relevant, and time-bound. BG is working with each of the teams to refine these action plans and to ensure the teams are equipped to carry out their goals.

The Results

Throughout this process, the BG team sought to advance the Division's vision: "To be an academic center of excellence that transforms the understanding and treatment of vascular disease." Together, BG and the Division reached the goal – to create a strategic plan to guide the next stage of growth and excellence for the Division.



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