Strategic Plan 2007-2012

The following plan was developed in 2006 – 2007. In January 2009, its centennial year, Samuel Merritt College became Samuel Merritt University. This Strategic Plan retains the College nomenclature to discuss documents and decisions that preceded January 2009.
A Time for Reflection: Mission, Vision, Values

Strategic planning has been central to Samuel Merritt College’s success over the last 25 years. The discipline of defining institutional strategy has moved the College from a hospital-based nursing school with fewer than 150 students to an accredited undergraduate and graduate health sciences institution with over 1,200 students enrolled in 12 academic programs at 4 sites. To achieve this transformation, the College has focused on expanding facilities, building faculty, developing institutional partnerships, strengthening systems, and acquiring medical and educational technology to support excellence in instruction. Innovative program design has been a hallmark. Samuel Merritt College (SMC) is now recognized as a leader for health sciences education in Northern California, with some of its programs drawing applicants nationally.

In 2006 the time had come to revisit the College’s mission, vision, and values statements that had last been revised in 1997. The result of a process of reflection and consultation with internal and external constituencies was a new mission statement:

**Samuel Merritt College educates students to become highly skilled and compassionate healthcare professionals who positively transform the experience of care in diverse communities.**

This mission focuses SMC on the fundamental purpose of its work – changing the experience of health care for the multi-cultural and multi-generational communities its students are preparing to serve. Some graduates will have deep impact at the bedside or in the clinic, one patient at a time. Others will have a wider impact through leadership, teaching, or policy development in a health profession.

A new vision drives the 2007-2012 plan. As the beginning of Samuel Merritt College’s second century approaches in 2009, this ambitious vision calls for the College to achieve national stature based on its educational quality and student accomplishment.

**Samuel Merritt College will become nationally recognized as a premier, health sciences institution. Expert faculty and staff will shape an inclusive learning environment where all students experience best teaching practices and state-of-the-art learning approaches. The College will select and support students who will flourish in its rigorous academic programs, learn to practice expertly, and pass licensure or certification exams on first attempt.**

In considering how to translate this vision into action, faculty, staff, and administration looked at what concrete achievements would constitute success and
which audiences would be most critical to reach. They determined that the College’s ability to recruit outstanding students and faculty, attract financial support, and become known for important contributions to academia and health professions were the most important indicators. These indicators, with specific measures or focus areas, were captured in a graphical representation of the vision, included as Figure 1 below.

National recognition would mean becoming widely known among faculty and potential students as a leader in health sciences and becoming a sought-after resource to media and policy-makers seeking to understand the health professions. These four groups appear as key audiences in the center of Figure 1.

Figure 1: Samuel Merritt College Vision 2012
A new statement of SMC’s core values emerged from student, faculty, and staff focus groups; key informant interviews; and a participatory process that involved the whole College community. The new statement reflects those qualities that the community identified as fundamental principles that define the College’s culture and way of working.

At Samuel Merritt College we value . . .

- A learning environment where we challenge ourselves and our students to think critically, seek mastery, and act compassionately.
- A collegial environment where we are fair, respectful, and behave with integrity.
- A collaborative environment where we partner with one another and with others in the community.
- An innovative environment where we take reasoned risks and move nimbly.
- A results-oriented environment where we provide and expect exceptional performance and service.

A Changing Environment

A careful examination of the environment surrounding higher education and healthcare presented major challenges. Samuel Merritt College is prepared to address these challenges through the four major strategies outlined in this plan. The most important forces that shaped the College’s plan include:

- Society is demanding that higher education institutions be accountable for demonstrating institutional performance and measurable student learning outcomes.
- Students tend to have less preparation for higher education, more reliance on computers and technology, and a greater need for immediacy and experiential learning in the curriculum.
- The student population brings an increasing diversity of backgrounds, learning styles, expectations, and values that present new challenges in attaining educational outcomes.
Employers expect graduates who are prepared as quickly as possible to perform effectively in the clinical setting without an extended period of additional on-the-job training. At the same time, professions will press for doctoral-level preparation to demonstrate new or advanced practitioners’ mastery of technical skills and broad knowledge.

An environment of relatively high clinical salaries and shortages of clinical personnel will make it difficult to recruit and retain qualified faculty.

The three most critical determinants of enrollment capacity and attractiveness to prospective students will be availability of faculty, quality of facilities, and access to high-quality clinical sites. Technology offers the potential to extend and better utilize scarce faculty and clinical resources.

Consumers will look for access to and capabilities of technology as leading indicators of program quality in education, so institutions will need to adapt their learning and service approaches to meet the expectations of a computer-reliant generation of students.

New opportunities and configurations will emerge for higher education to partner with health care systems to address critical workforce shortages.

Critical staffing shortages and stressful work environments in clinical settings will threaten the co-educator role of practicing clinicians, increase performance expectations for new graduates, and reshape practice patterns.

A challenging economic environment will both encourage students to seek higher education and make it more difficult for them to afford private education.

The 2007 Strategic Plan

In this environment, Samuel Merritt College seeks to achieve a national reputation for excellence in health sciences education as articulated in its vision statement. With the vision as the driving force, in early 2007 leadership organized the Strategic Plan around four major strategies that were considered essential to achieving the targets illustrated in Figure 1 on page 2:

- SMC will distinguish itself through instructional innovation that increases student learning and achievement.
- SMC will increase institutional capacity by building financial resources while investing in faculty and staff, facilities, and partnership development.
- SMC will provide students with superior value by consistently exceeding expectations of quality.
• SMC will provide an inclusive learning environment that supports full engagement of all students, faculty, and staff.

These strategies focused and organized the College’s work in 2007 and early 2008.

Specific goals were developed to implement the four strategies and to guide institutional, divisional, and departmental efforts. Major milestones included completing a plan to initiate SMC’s Doctor of Pharmacy degree program and obtaining Regents’ approval; progress in defining a College master facilities and capital plan; development of Centennial year program plans; initiation of formal inclusivity planning; organizational development in preparation for WASC re-accreditation; and Regents’ approval to become a university.

With the 2007 vision as the lynchpin of Samuel Merritt College’s planning, the approach has been refined to facilitate closer monitoring of progress toward strategic goals. This has enabled the College to adjust to changes that continue to occur within the College, around its affiliated medical center, and in the broader environment of higher education and health care.

2009 Strategic Plan Update

Since 2007 Samuel Merritt has pursued eight major initiatives in support of the Strategic Plan. The following chart outlines these major initiatives, the rationale for pursuing them, and the College’s target.

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<tr>
<th>Initiative</th>
<th>Rationale</th>
<th>Target</th>
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<tr>
<td>Create Doctor of Pharmacy program</td>
<td>National program at doctoral level addresses acute shortage, raises SMC national profile, and provides strong financial return.</td>
<td>Open program by Fall 2011. Develop simulation settings and scenarios to teach assessment skills and medication effects.</td>
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<td>Reposition California School of Podiatric Medicine competitively.</td>
<td>Opportunity to emerge as the best doctoral program among of a small number of national competitors in a field where SMC’s program has a long history.</td>
<td>Matriculate 52 students per year by 2009. Steadily increase selectivity and enrollee quality. Recruit two nationally known research faculty by 2011. Implement use of patient care simulation</td>
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<tr>
<td>Implement Doctor of Nursing Practice program</td>
<td>Advance development of nursing profession and national profile of SMC through excellent curriculum delivered primarily online.</td>
<td>Open program in 2010-2011 academic year.</td>
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<td>Develop and expand Health Sciences Simulation Center</td>
<td>Increase student learning and strengthen teaching by using team and individual simulation of actual patient care situations, followed by scenario debriefing and research.</td>
<td>Improve institutional student learning outcomes in all SMC programs by 2011.</td>
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<td>Develop and begin implementation of Master Facilities Plan.</td>
<td>Need to replace facilities of programs/services displaced by ABSMC construction and assure that academic programs have facilities necessary to support the mission/vision. Need to support new teaching modalities for interactive learning, enable growth in existing programs, and add capacity for new program development.</td>
<td>Develop integrated campus that accommodates the student, faculty, and staff population by 2012. Create basic science labs, computer labs, and smart classrooms that support instructional innovation.</td>
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<td>Develop and implement Diversity Plan.</td>
<td>An explicit part of the strategy and vision.</td>
<td>Measurably increase diversity of student, faculty, and staff population by 2012 as determined in Diversity Plan. Increase satisfaction of student, faculty, and staff with campus atmosphere that</td>
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<td>Increase fundraising capacity</td>
<td>Help provide funding to support the institution’s goals and to recruit</td>
<td>Raise $4 million in endowed funds by 2012.</td>
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<td>extraordinary students regardless of their ability to pay.</td>
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<td>Strengthen College image</td>
<td>Potential to dramatically increase national draw in competitive recruiting</td>
<td>Significantly broaden geographic student applicant pool by 2012.</td>
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<td>for students and faculty.</td>
<td>Success in attracting nationally known faculty.</td>
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<td>Develop institutional performance dashboard</td>
<td>Enables SMC to benchmark progress toward national stature. Increases</td>
<td>Functioning i-portfolio consistently used in decision making.</td>
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<td>institutional capacity to use data for decision making.</td>
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<td>Achieve WASC reaccreditation</td>
<td>Supports institutional goal of performing at the highest quality level.</td>
<td>Successful Capacity Review in 2009.</td>
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<td>Required to be eligible for Federal funds.</td>
<td>Successful Educational Effectiveness Review in 2011.</td>
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<td>Contributes to superior reputation that supports student and faculty</td>
<td>Reaccreditation with no major recommendations.</td>
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Engaging the Board of Regents

The Board of Regents approved the new Mission, Vision, and Values in 2006. The College’s strategies were presented in 2007, and the Regents received regular reports on progress. In March 2008 the Regents made the momentous decision that Samuel Merritt College should become a university. They set the goal of accomplishing the name change in January 2009 on the 100th anniversary of the institution’s founding. The name change crystallized an important institutional evolution in the College’s history. In fall 2002 SMC had begun offering clinical doctoral degrees in Physical Therapy (DPT) and in Podiatric Medicine (DPT). The DPT grew out of the College’s well-respected masters program, consistent with a trend in the PT profession. The College began offering the DPM when it acquired the program and assets of the California College of Podiatric Medicine.

The move into doctoral education opened new opportunities and created new expectations for Samuel Merritt College. The college had grown in 20 years from one undergraduate degree program in a single discipline to encompass two bachelors programs, three masters programs, and two doctoral programs (with two additional doctoral programs being developed in nursing and pharmacy). Its structure had evolved to include separate schools of Nursing and Podiatric Medicine, each headed by a dean. With a greater variety of degree levels and disciplines and a more complex institutional structure, the university moniker seemed appropriate to acknowledge historic growth and to set high expectations for the institution’s future.

This institutional evolution was mirrored in the oversight role of the Board of Regents. In June 2008 the Board of Regents and the College’s executive team adopted a methodology to focus and align their efforts. They agreed upon a specific set of three-year goals that would engage the Regents directly to substantially move the College toward its vision. These goals captured key concepts contained in the 2007 strategies and initiatives, linking them all to major decisions by the Board of Regents. The goals were:

- **Become a nationally recognized, premier health sciences university.**
- **Secure endowment, capital, scholarship, and other funds to meet the University’s needs.**
- **Achieve WASC re-accreditation.**
- **Create a culturally diverse university.**
- **Create a university campus that is physically integrated.**

Implementation Plan

Each of these goals has action steps and milestones plotted out for six months. The Executive Team conducts an internal status review monthly and a formal review of
progress toward the goals at each regular meeting of the Regents. The action steps and milestones are adjusted accordingly during Regents’ meetings. At the Regents’ annual retreat, performance is reviewed in relation to achieving the College’s vision, and the entire action plan is revised and updated. Division and department goals and action plans flow out of and inform these semi-annual reviews.

Key actions for the June 2008 – February 2009, for example were:

**Become a nationally recognized, premier health sciences university.**

- Determine new university name and gain approval to implement, announcing in January 2009.
- Demonstrate progress in developing the School of Pharmacy.
- Develop a marketing plan to achieve recognition nationally and within Sutter Health organizations.
- Report to Regents on capacity and effectiveness criteria for high-quality doctoral programs.

**Secure endowment, capital, scholarship and other funds to meet the University’s needs.**

- Regents approve a Centennial Campaign including implementation of the Doctor of Pharmacy Program
- Regents approve targets for endowment and scholarship goals.
- Raise $500,000 to match Sutter grant to renovate Graziano Library.

**Achieve WASC re-accreditation.**

- Implement assessment system using institutional and academic performance indicators.
- Present to Regents the major recommendations of Capacity and Preparatory Review (CPR) report due to WASC in May 2009.

**Create a culturally diverse university.**

- Present student demographic baseline data and gain Regents’ approval for recommended diversity goals.
- Present to Regents SMC’s current and future strategies for increasing student diversity.
- Present an institutional inclusivity plan to Regents for approval.
Create a university campus that is physically integrated.

- Regents approve Master Facilities Plan, including funding formulas and assumptions.
- Complete plan for 2008 and 2009 physical plant projects.
- Develop internal and external communication plan for Master Facilities Development, Capital Campaign, and Centennial.
- Regents approve student housing plan.
- Implement user-friendly facilities and services guide/map and signage program for Oakland campus.

With this type of semi-annual planning and monthly monitoring of progress, the organization will continually work toward closing the gap between current reality and future vision. Thus, by 2012 Samuel Merritt will have made steady progress toward becoming nationally recognized as a premier, multi-specialty health sciences institution.

Conclusion

In 2006 – 2007, Samuel Merritt College revised its mission and created the vision and strategies articulated in this Strategic Plan. This provided an important framework that aligns the work of administration, faculty, staff, and the Board of Regents in pursuit of educational excellence and national recognition in health sciences. Continuing collaboration in executing this plan holds the potential to continue to transform the College as 2012 approaches.