

# University of Florida College of Dentistry

## APPLIED STRATEGIC PLANNING OUTLINE

October 23 and 24, 2006  
Gainesville, Florida ~ Retreat I

Strategic Planning Facilitators: Robert L. Frazer, Jr., DDS  
Lee Frazer, MS

Strategic Planning Participants:

Dr. Kenneth Anusavice	Dr. Micaela Gibbs	Dr. Boyd Robinson
Mr. Russ Armistead	Dr. Henry Gremillion	Dr. Venita Sposetti
Dr. Ike Aukhil	Dr. Marcio Guelmann	Dr. David Stillwell
Dr. Robert Bates	Dr. Marc Heft	Ms. Jean Sweitzer
Dr. Paul Blaser	<a href="#">Sanjie Jackson</a>	Dr. Suzi Thiems-Heflin
Dr. Robert Burne	Mr. Stephen Kostewicz	Ms. Julie Thompson
Ms. Colette Cimino	Dr. Sam Low	Dr. Scott Tomar
Dr. Buddy Clark	<a href="#">Manav Malik</a>	Mr. Ken Tomlinson
Dr. Nereyda Clark	Dr. William McArthur	Dr. Frank Vertucci
Dr. Don Cohen	Dr. Roberta Pileggi	<a href="#">Jerri Wainer</a>
Dr. Teresa Dolan	Dr. Robert Primosch	Dr. Timothy Wheeler
Dr. Ulrich Foerster	Mr. Joe Richardson	Dr. Robert Yeziarski

**Day 1 – 8:30 a.m. opening ~ Session 1 - “Thoughts for the Day”**

### **I. Introduction and Overview –**

- A. Welcome, Opening Remarks – Henry Gremillion
  1. Why we are here, ASP, introduce Dr. Bob Frazer & Lee Frazer
  2. Logistics, times for lunch, reception, etc. – **Jean S**
  3. Dean’s Opening remarks – our hopes, our commitment, etc. – Dr. Dolan
  
- B. Introductions & Overview Retreat I
  1. Using both hemispheres... centering
  2. The Mission of the ASP Series...

*“To create a future of choice for the University of Florida College of Dentistry . . . its faculty, staff, students, patients, and all stakeholders. Through the process of Applied Strategic Planning, the college and it’s people will achieve their highest potential in service to others, resulting in increased effectiveness, continuity, fulfillment, success and significance.”*

C. Introductions - Hopes, Fears and Desired Outcomes

1. Effective Group Process...

D. Retreat to Cover -

1. Forming this diverse group into a functional team with a clear mission, strategic roles / responsibilities, consensus, rules of engagement, necessary timelines, etc.
2. Understanding of and engagement with the process of action oriented Applied Strategic Planning (ASP) for UFCD.
3. Share and discuss the Organizational Assessment and Organization Health Survey
4. Clarify and/or readopt the Core Values of UFCD
5. Drafting a Consensus Vision of the future of UFCD – 5 and 10 years out.
6. Creation and /or modification of a UFCD Mission statement that concisely answers **What**– UFCD intends to become, **Who**– UFCD will serve and **How**– it will serve.
7. Establish Shadow Teams (ST) – behind as many members of the SP group as possible - creating a deep diagonal cross-section through the entire college to gain feedback, broad insight / creativity and most importantly ownership of the ASP.
8. Written homework for Retreat II – light reading, plus complete Covey’s 7 Habits of ...

E. Notebooks, Bibliographies and Methodologies

F. Personal Mini- Biographies ~ 9 minutes each – four groups

1. As we listen - What are the values expressed & the lessons to be remembered?

## II. Introduction to Applied Strategic Planning/Management (ASP/M)

- A. Strategist... one who makes command decisions
- B. Long Range Planning VS. ASP
  - 1. The three states of time... Past – Present – Future
- C. Covey's 7 Habits of Highly Effective People
  - 1. First Four Habits – mini-review and discussion in reference to the College...limited due to time.
    - a. # 1 - Be Proactive...
    - b. # 2 - Begin with the End in Mind...
    - c. # 3 - Put First Things First...
    - d. # 4 - Think Win-Win...
- D. Why Do ASP?
  - 1. ↑ Fulfillment
  - 2. ↑ Perceived Value
  - 3. Defeat competition
  - 4. Continuity of purpose and action
- E. Flow Sheet of ASP Process
  - 1. A funnel like process
  - 2. Process more important than product
  - 3. The Concept of **DRAFT**
- F. Strategic Architecture – high-level blueprint – capabilities to be built – “the load bearing structures”

## III. Planning to Plan - Paradigms – Our Maps of Reality

- A. The Organizational Assessment Report
  - 1. Executive Summary Review & Discussion
- B. Review & Discussion of the Pre-retreat Organizational Health Assessment – see summary

#### **IV. Values Audit (Core Values Clarification)**

- A. Defined...Guiding principles...meet three tests
  - 1. Freely chosen with awareness of the alternatives & consequences of our choices.
  - 2. Act upon
  - 3. Prized – we tell others...

**Note:** Core values are not abandoned even if they become a competitive disadvantage.
- B. Individual Core Values Reviewed
- C. Group Values (UFCD's ideal graduate – vs. the prototypical student)
- D. UFCD's Organizational Core Values
  - 1. Values reflected above – define and discuss.
  - 2. Contrast with Values from previous bios
  - 3. See UFCD's current Values
  - 4. Consensus Core Values

Some closing thoughts and homework – “Strategy As Revolution”

~ Day 2 – **Session 3 ~ “Thoughts for the Day”**  
*Please sit in a different place today...*

#### **V. Vision - UFCD 2011...**

- A. “The Power of Vision” – Seneca
  - 1. “Foresight First” – Homework Review
- B. Joel Barker video
  - 1. Debrief video . . . . apply to UFCD
- C. What Were the Lessons of Apollo 11?
- D. Vision Exercise – UFCD 2011
  - 1. Progressive Relaxation & Guided Imagery
  - 2. Writing Individually
  - 3. Sharing in groups (4)
    - a. Consensus Vision 2011 Group – break into parts

Possible major divisions: Facilities, Faculty, Education or Curriculum, Research, Operations, Patient Care ...

- b. Present to entire group
- 4. Groups – overall consensus Vision 2011 –
  - a. Consolidation & preference

**VI. UFCD’s Vision Alignment with Core Values**

- A. Core Values (see previous IV) – Is there good alignment? If not what needs to be added or changed?
- B. Discussion and Refinement as necessary – Consensus

**VII. Mission of the UFCD**

- A. What, Who and How
- B. Other Successful Organization’s
- C. Current Mission - Will it take us to the new vision?
- D. Draft Consensus Mission UFCD



**Note:** Suggest personal mission statements be part of the next retreat.

**VIII. Retreat II . . . What Next - Homework Assignments**

- A. Next Retreat tentative dates January 30 & 31, 2007
- B. ASP Shadow Teams – who will lead... see ST notes
  - 1. Please notify Jean of your ST members by \_\_\_\_\_
  - 2. Summary minutes from Bob Frazer for review & edit by Jean S.
  - 3. Final minutes to entire group.
- C. Read those parts of notebook you did not get to read during the Retreat. (Pre-Retreat II)
- D. Critiques / Comments
- E. Thanks & Closing Comments

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