



Achieving Aspirations

March 2019

The WesternU Way —
Collaboration & Excellence

An update on WesternU Strategy
President Daniel R. Wilson, MD, PhD



www.westernu.edu/strategy

Achieving Aspirations

Strategic Progress Report March 2019

Western University of Health Sciences
Education. Research. Service.



The Strategic Performance Group launched in September 2018 with more than 100 faculty and staff to further author the WesternU Strategic Plan - Achieving Aspirations. Five groups across the strategic arc are aligning the University mission of Education, Research, and Service.

Achieving Aspirations

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President Wilson on a recent trip to India, lighting the ceremonial lamp with the Hon'ble Shri Badnore, Governor of Punjab (L-R CGN Dean Mary Lopez, Rattan College Chair Mr. SL Aggrawal, Dr. Wilson, Gov. Radnore, and Dr. Ivy Tuason of CGN).

A MESSAGE FROM PRESIDENT WILSON



As is evident in these pages, audacity, innovation, and adaptability have been in the DNA of WesternU since its founding as the College of Osteopathic Medicine of The Pacific.

Every success of our wonderfully unique and agile University has sprung from boldness, innovation, and flexibility, even as these elements guide us to new successes on the horizon.

We have an abundance of rich opportunities at nearly every turn, including international partnerships; growth in Oregon; prospective new colleges, degrees and programs; growing philanthropic efforts; and enhanced integration of operations.

These are among a multitude of means to move our mission of education, service, and research forward in the years ahead as we achieve our aspirations.

OUR OBJECTIVE

Our objective with Achieving Aspirations is to move this great University forward to wonderful new horizons. WesternU, which has grown astoundingly from the foundation established by Dr. Philip Pumerantz, is embracing a new era. Pioneering academic enterprises remain our core mission even amid current challenges in higher education. To sustain our mission, we must move forward with efficiency and enterprise excellence.

We cannot be complacent in our success. We must transform operations from a confederacy of colleges to a true university with decidedly improved systems and processes.

To this end, the Strategic Performance Group has mobilized the tremendous talents of hundreds of faculty and staff as we move from concept to consequence. Yet this is only the beginning of our pivot to a promising future.

In only a year, the SPG has positioned WesternU for future readiness building on the WesternU Way — a rock-solid foundation of humanistic science. We are building capacity for growth of “mission and money” on a host of new horizons, including global health, digital education, new colleges and degrees, innovation, campus master plans, and enhanced

philanthropy. All of these are to meet expectations of students today and in the future.

To all who answered the call to contribute their work and wisdom — THANK YOU! To all others, I look forward to engaging your time and talent in next steps to advance our special University.

The effort, heart, and passion we share in moving WesternU forward is to the betterment of our students and, consequentially, to our communities and the wider world as we strive to achieve ever higher aspirations.



ONE MISSION
ONE VISION
ONE UNIVERSITY

We are better together.
 We must rebalance our academic and operational portfolio as a University, not merely a confederation of colleges.

COMMITMENT TO STRATEGY FROM LEADERSHIP

In July 2018, WesternU deans and several key leaders held a strategic conclave to discuss the launch of a University-wide strategic planning initiative. The deans provided input on priorities, mechanisms to enable collaboration, and opportunities that will arise from enhancing enterprise excellence.

Although each college builds individual strengths, one encompassing university strategic plan is underway at the service of the colleges and to expand the reach of WesternU into external communities and stakeholders. Each of the deans contribute to the Strategic Performance Group through their leadership,

counsel, participation on teams, and support to staff and faculty who have volunteered to help author the plan. Here the deans express how the Achieving Aspirations plan will impact each college now and into the future.



DR. PAULA CRONE

College of Osteopathic Medicine of the Pacific

"A high-quality curricular experience is our college's ultimate aim. All in all, the strategic planning process will be beneficial to our students' educational experience as many of the initiatives will support our newly developed and implemented curriculum. We are excited to see where we go next."



DR. STEPHANIE BOWLIN

College of Health Sciences

"The university strategy provides direction to assist the college in its development and evaluation processes. The outcomes of the university strategy process will result in resources, policies, practices, and services at all levels of the institution, benefiting existing and future educational programs."



DR. DANIEL ROBINSON

College of Pharmacy

"University strategy will help the College of Pharmacy by developing the systems needed to extend the WesternU brand, improve student experience, and allocate resources to growth programs - all of which will increase our ability to recruit students, faculty and external research partners."



DR. MARY LOPEZ
College of Graduate Nursing

"A thorough strategic plan reflects an actionable, measurable plan for achieving academic-critical objectives: improving the College of Graduate Nursing's online programs, stepping up our student experience on campus and remotely, and expanding advance practice programs locally, regionally, and internationally."



DR. PHILIP NELSON
College of Veterinary Medicine

"The areas identified in the university strategic plan are designed to ensure effective and efficient utilization of all resources, position and prepare for future growth and societal changes and leverage the strengths of the university while preserving the cultural values of our institution."



DR. STEVEN FRIEDRICHSEN
College of Dental Medicine

"A cogent and clearly articulated strategy can help frame, prioritize and align college-level activities. Improvements in operational efficiencies will allow the colleges to direct more time and energy toward the academic mission of the institution."



DR. ELIZABETH HOPPE
College of Optometry

"It is important for our College because it enables us as stakeholders to work toward the common vision. The WesternU strategic plan provides a framework that makes it possible for the college to contribute to the achievement of these goals, particularly students' educational achievements."



DR. LESTER JONES
College of Podiatric Medicine

"WesternU strategy helps to re-identify the actions needed to achieve our college goals and mission and assure alignment with the University goals, keeping the college in compliance with the requirements for professional accreditation."



DR. MICHEL BAUDRY
Graduate College of Biomedical Sciences

"The GCBS is developing new programs, and it is therefore critical that we position these programs based on the overall strategy being developed by WesternU. Strategy will better integrate the College within the University, increase faculty and student recruitment and retention, and increase collaboration with other Colleges."

DESIGNING A STRATEGY FOR OUR FUTURE READINESS



Nicholas J. Webb
Director, Center for Innovation



The assessment

Through the assistance of key leaders at the University and outside partners, we conducted a future readiness assessment to review the current systems, methods and processes in place across all colleges and departments. We quickly determined there was a great opportunity to build upon our excellent foundation so as to ensure sustainable growth and student value. This assessment included evaluation of University-critical areas related to operations, including technology, student experience, executive development, financial stewardship, enterprise excellence, innovation, diversity, and the institutionalization of strategic excellence.

The plan

At the conclusion of the assessment, it was clear that there were several areas that could be improved upon through enterprise management best practices. This led to the development and deployment of our Mission-Critical Strategic Deployments. These deployments were urgent issues that needed immediate attention. I'm pleased to report that we have achieved tremendous progress over the last year in the optimization of technology, brand and marketing, innovation, executive leadership development, lean best practices, and student experience design, to name but a few. In fact, the deployment of Wave One and Two are ahead of schedule thanks to the great work of our Strategic Performance Group (SPG).

The Strategic Performance Group (SPG)

Our Mission-Critical Strategic Deployments represented the emergent issues that needed to be addressed when I started my consulting work at the University. The next task was to optimize business processes throughout our entire University. Working with the newly formed Center for Innovation, we developed the SPG expressly for the purpose of transitioning from a triage mode to an optimization mode. The SPG group ensures that strategy was not a command and control process, but rather a collaborative process across our colleges and departments that provided a voice to our faculty and staff.



WESTERNU STRATEGY AS A MODEL

UPCOMING PRESENTATIONS

We have the honor of presenting WesternU's strategic framework at two upcoming conferences:

WASC Academic Resource Conference 2019

Hyatt Regency Orange County, CA, April 10-12, 2019

SCUP 2019 Annual Conference

Washington State Convention Center, Seattle, WA, July 14–16, 2019

The following is WesternU's submission to the WASC call for proposals:

To ignore the disruptive forces in higher education represents a suicidal stance for any institution. Western University of Health Sciences (WesternU) made a bold strategic decision to transform its very core by architecting and adopting a new strategic framework rooted in innovative approaches and designed to shake the status quo.

To enact a vision formulated by the President, a consulting firm specializing in disruptive innovation and enterprise management was hired with the goal to create a new strategic framework. This would serve as a scaffolding platform designed to support several key performance groups, directly impacting all service, administrative, and academic areas. This ambitious strategic initiative was designed to create deeply rooted and transformational changes that would permeate the entire organization. This presentation focuses on describing the newly created strategic framework, which embraces core values embedded within innovation and disruption principles that have proved to foster enterprise excellence. The guiding theoretical framework that informs the newly developed strategic planning is radical incrementalism. It is a theory applied in a context of disruption to address massive changes being gradually implemented, and focuses on harnessing the collective power of participants (faculty, students, administrators, and staff), contributing with many small and big local ideas and actions. The design and formulation of this new strategic framework were architected in such a way that any institution can use them as a toolbox composed of modular components that can be easily adapted and repurposed. As such, strategic components such as key performance indicators are integral components of the framework and can be swapped out in order to be meaningful and relevant to any given institutional values. This framework can be highly instrumental in meeting the needs of any institution wanting to embrace deep and transformational change and thrive in a disruptive age.

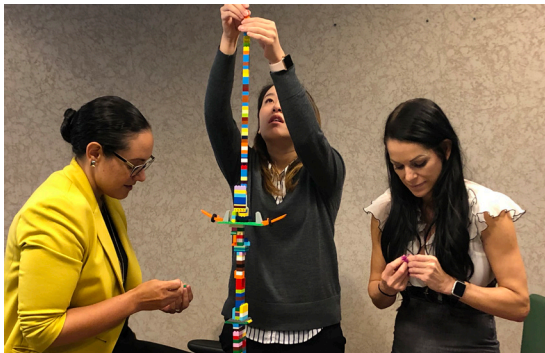


**Society for College
and University Planning**

HOW WE ENSURE SUCCESS

THE WESTERNU WAY

Since its earliest beginnings, WesternU has planted seeds and thrived through the power of its biggest asset - WesternU's people. The unique humanistic culture that embodies the WesternU Way drives this strategic process. The goal now is to bring WesternU's dedicated administration, faculty, and staff another giant step forward with the adoption of today's best practices in project management, process improvement, financial transparency, and enterprise systems. The Strategic Performance Group has woven all of these enterprise best practices throughout its own management and through the goals of many of the teams. Our Achieving Aspirations Strategy is now owned and powered by talented faculty and staff across the University!



PROJECT MANAGEMENT

SPG Project Liasons learned project management principles at a day-long training customized for the WesternU SPG framework. The project is a critical component of the strategic planning process using the Cascade Strategic Management Platform, formal project management templates and designated project leads to manage team projects.



EXECUTIVE DEVELOPMENT

The first Executive Development event featured Chester Elton, author of *The Carrot Principle*. Chester delivered the message of "One Vision, One Mission, One University" and the importance of culture. He also emphasized the importance of recognition, individual motivational drivers, and above all, kindness.



PROCESS IMPROVEMENT

More than 50 Lean Champions received three days of training, access online training, and green belt certification testing for Six Sigma process improvement methodology. The in-person training was customized to higher education and focused on study of actual WesternU issues. Lean Six Sigma is widely recognized as a valuable skill set for problem solving, using data to drive decisions and improvement through incrementalism.

IMPACT ON MISSION

HOW WE MEASURE SUCCESS

The Board of Trustees has approved Achieving Aspirations, its Strategic Pillars and Priorities, as well as Key Performance Indicators (KPIs). The Cascade Strategic Management system tracks all projects across the WesternU strategic arc with quantifiable metrics for our missions of Education, Research, and Service. Success at the highest level is determined by two primary goals: **Return on Mission** and **Return on Investment**.



PLANNING & REPORTING

The KPIs & Planning Instruments team created a method of aligning projects with university priorities and mission. This system will tie project charter details to the project selection scorecard and into the Cascade Strategic Management System to create categorized reports. As teams develop the project charter and project plan templates, they will attribute strategic initiative codes seen below to goals and objectives. The SPG Executive Dashboards team is developing a dashboard system with financial and non-financial Key Performance Indicators (KPIs) to ensure that data-driven decision-making and transparency are an ongoing part of WesternU’s management.

STRATEGIC INITIATIVE KEY			
Strategic Arc	Strategic Pillars	Strategic Priorities	KPI Categories
1. Education	4. Educational Excellence and Online Learning	9. Educational Relevance and Quality	14. Educational Quality & Relevancy
2. Research	5. Interprofessionalism	10. Operational Excellence	15. Student Experience
3. Service	6. Collaboration and Partnerships	11. Student Experience	16. Strategic Vision & Planning
	7. Revenue Diversity	12. Culture of Collaboration and Innovation	17. Financial Performance
	8. Innovation and Operational Excellence	13. Strategic Results	18. Strategic Results

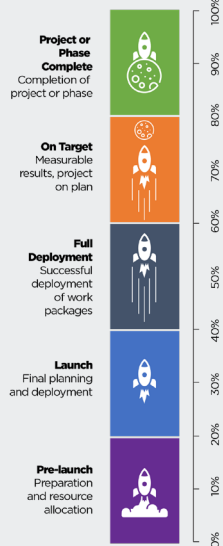
PROGRESS REPORT

STATE OF MISSION-CRITICAL STRATEGIC DEPLOYMENTS (MCSD)

MISSION-CRITICAL STRATEGIC DEPLOYMENTS (MCSD)

WAVE I

WAVE II



100% Technology Optimization

- ✓ On-board CTO Executive

Next Steps: New phase owned by CTO Executive Internal Assessment CTO plan for review and approval

70% Organizational Excellence

- ✓ SPG Launched with engagement of 150+ WesternU faculty and staff

Next Steps: Complete SPG trajectory to Delta Project

30% Digital Marketing

- ✓ Simpson Scarborough assessment complete

Next Steps: Align Simpson Scarborough recommendations with university priorities SPG team project deployments

30% Innovation Leadership

- ✓ Innovation Champion program launched

Next Steps: Complete Lecture Series Complete Online training modules

90% Executive Development

- ✓ Hosted Fall Executive Development event with Chester Elton

Next Steps: Complete development and host Spring 2019 event with Strategic Film Festival Host Summer 2019 Board of Trustees Strategic Roundtable event

30% Student Experience Design

- ✓ SPG Team gap analysis complete

Next Steps: SPG Team project approval

100% Online Learning

- ✓ Online learning executive on-boarded

Next Steps: New phase owned by OL Exec. Exec. to complete assessment and present recommendations

30% Revenue Growth

- ✓ Four SPG Teams engaged with revenue diversity outcomes

Next Steps: Teams following SPG trajectory Launch projects with close tracking

85% Financial Stewardship

- ✓ SPG Lean Initiative Team established & successfully building Six Sigma program
- ✓ Procurement Audit underway

Next Steps: Team following SPG trajectory Develop sustainable program

STATE OF STRATEGIC PERFORMANCE GROUP (SPG)

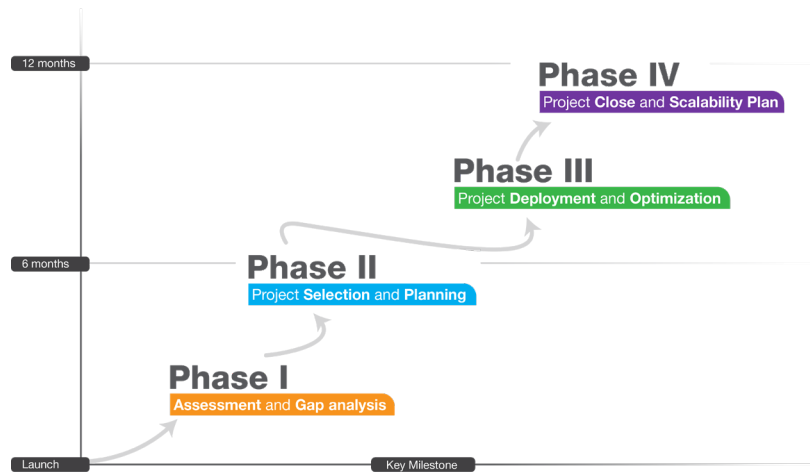
SPG Teams progress along a trajectory through traditional project management phases: initiating, planning, executing, monitoring and controlling, closing. Sound project management principles ensure that projects are completed successfully, with minimal risk to the organization and maximum positive impact to the mission.

Although significant work has already been accomplished, SPG teams are currently in the planning phase. Teams have completed assessment and gap analysis. From the gap analysis, each team will determine the highest priority and complete a project charter. This charter will serve as a proposal to President Wilson, who will weigh

all projects against the university's mission, resource requirements, viability, and potential outcome. In mid-March, all team members will present project charters during the live, Zoom call: Checkpoint Beta. Once project charters are approved, teams will complete detailed project plans and deploy.

PROJECT MANAGEMENT TRAJECTORY

- ✓ President Wilson listening sessions
- ✓ First strategic conclave and ideation session
- ✓ Introduction of President Wilson's strategic pillars
- ✓ Summer 2018 strategic conclave
- ✓ Launch of the Strategic Performance Group
- ✓ Development of gap analyses
- ✓ Checkpoint Alpha: Gap Analyses
- Development of project charters
- Checkpoint Beta: Project Charters
- Approval of project charters
- Executive Development & Strategic Film Festival
- Completion of project plans
- Full project deployment
- Checkpoint Charlie: Project Progress
- Completion phase 1 of SPG
- Introduction of the Delta Project



The SPG Delta Project will ensure that the mid- and long-term projects launched during this first year of SPG reach completion and that the improvements are institutionalized and sustained. Project Delta will also identify other strategic improvement opportunities and work within the SPG framework to deploy a second wave of strategic optimization and future readiness.

STRATEGIC PERFORMANCE TEAM

GLOBAL STRATEGIC PERFORMANCE

Support SPG teams and the entire strategic planning process to ensure forward movement and overall success.

Progress Made:

- ✓ The Global Performance SPG has provided support for the overall SPG, collaborating with Nicholas Webb and the Center for Innovation on trajectory and measurements planning. In addition, the team has provided assistance directly to individual teams with clarifying focus, minimizing overlap between other SPG teams, and facilitating collaboration among teams.
- ✓ The global team has completed review of the gap analysis for each of the focus areas teams and is now reviewing the project charters of the focus areas.
- ✓ The team has developed a project scorecard as a decision-making tool in project selection.

Next Steps:

- The team will continue project charter reviews and provide feedback until the charters have met requirements.
- The team will apply project charter details to balanced scorecard to prioritize projects to assist President Wilson's project approval decisions.

EXECUTIVE DEVELOPMENT

Enhance WesternU's managerial and leadership expertise with programs around enterprise best practices.

Progress Made:

- ✓ Hosted October 2018 Executive Development event with Chester Elton, who delivered messaging around culture, recognition and "One Vision, One Mission, One University."
- ✓ Developed agenda and plan for Spring 2019 Executive Development event.

Learnings:

- The first Executive Development event had such a positive impact that it was determined more attendees should have the opportunity to attend the Spring 2019 event.

Next Steps:

- Host Spring 2019 Event.
- Develop and deploy survey to assess impact and gather feedback.
- Host Board of Trustees Summer 2019 "Strategic Roundtable" event.

KPIs AND PLANNING INSTRUMENTS

Develop templates and tools to ensure projects are managed efficiently and that outcomes are measured.

Progress Made:

- ✓ Modified the Project Charter template to improve the ability to assess project alignment with mission and objectives.
- ✓ Identified potential KPIs across team projects for upcoming project planning phase.
- ✓ Held Cascade training and workshop to gather updates and prepare users for project plan implementation.

Learnings:

- The overlap between planning instruments and mid- and long-range planning teams resulted in a team merger. This will allow the strategy team to work more cohesively as project charters are scored and prioritized, and again during deployment.

Next Steps:

- Modify the Project Plan template to align team planning with Cascade input, SMART Goal tracking, and dashboards.
- Host workshop to assist teams with project plan entry into Cascade.
- Build sample dashboards to assist teams in determining SMART goals for projects and deliverables.

The Strategic Performance Team is developing tools to support decision-making and measurement of financial impact and impact on mission. This is an example of a scorecard under consideration that represents attention to alignment with mission, value added, and risk.

Project Scoring Worksheet	Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4	Evaluator 5	Average Score	Weight	Weighted Score
Strategic Alignment							40%	17.10
Project fits University strategy	7	0	9	5	8	5.8	15.00%	8.7
Project leverages core strategic priorities	1	5	0	8	6	4	15.00%	6
Project supports balance among strategic pillars	3	2	4	0	3	2.4	10.00%	2.4
Risks							20.00%	12.04
Project is technically feasible	8	9	10	8	9.5	8.9	4.00%	3.56
We have or can acquire the needed knowledge and expertise	1	3	1	4	1	2	4.00%	0.8
The technology, complexity, & technical risk can be adequately managed	1	2	1	3	2	1.8	4.00%	0.72
Community, vendors, students, and employee interests are not at risk	10	8	10	9	8.5	9.1	4.00%	3.64
Risks and uncertainties can be effectively managed and responded to	9.5	10	7	8	7	8.3	4.00%	3.32
Economic Value Added							20.00%	12.42
The return on investment is good relative to the risk(s)	7	9	8	8	9.5	8.3	6.00%	4.98
Project's overall profitability is satisfactory	4	7	9	4	6	6	6.00%	3.6
There is a reasonable certainty of achieving specified forecasts, targeted costs, & targeted tuition rates (if applicable)	6	5	8	3	2	4.8	8.00%	3.84
Regulatory & Accreditation							20.00%	14.80
Project contributes to accreditation requirements	10	10	10	10	10	10	10.00%	10
Project deliverable meets environmental, health, safety, legal, and applicable regulatory compliance	6	5	8	3	2	4.8	10.00%	4.8
Total Score							100.00%	56.36

Project name:

EXAMPLE PROJECT

Evaluator Score Guide

1 Strongly Disagree

2

3

4

5

6

7

8

9

10 Strongly Agree

ACADEMIC PERFORMANCE TEAM

STUDENT EXPERIENCE

Design and implement projects to improve WesternU student experience.

Progress Made:

- ✓ Reviewed survey data gathered across campus from the past few years. We noted that a gap of data collection existed in the area of the current student experience (unrelated to coursework).
- ✓ Video Anthropology Project, testimonial (video) and anonymous (written) comments, Pomona and Lebanon campuses. We asked open-ended questions such as “What do you love at WesternU?” and “What would you change at WesternU?”
- ✓ Analyzed the Video Anthropology Project data.

Learnings:

- Strengths - students have a strong sense of community at WesternU (“I love WesternU”) and faculty are key to student happiness.
- Areas for Improvement - students’ perceptions indicate that WesternU has three campuses with Palomares Street as the dividing line on the Pomona campus; food; study rooms; building and classroom modernization; safety.

Next Steps:

- Prioritize areas for improvement and propose projects related to these concerns.
- Priority one is already identified as safety, so projects related to solving these issues will be brought up first.

DEGREE EXPANSION & NON-DEGREE CERTIFICATIONS

Identify program opportunities and implement a pathway to institute new offerings.

Progress Made:

- ✓ Identified two separate but equally important projects:
- ✓ Create a centralized system to provide and track Continuing Education courses for students, alumni, faculty, and external stakeholders. There is no such system at this time. Many of the professions require the same continuing education courses.
- ✓ The group unanimously believes that we should not randomly select a program to champion forward without the voices of constituents (faculty/student/alumni) and a data driven feasibility study. Group determined requirements for new program selection process.

Learnings:

- Current process is not designed to address the varying levels of degree/non-degree opportunities including dual degree, new degree, unbundling for stackable degrees, certifications, and pre-requisite courses.
- Current process lacks transparency, efficiency and effectiveness to evaluate and initiate the trajectory of various degree opportunities.

Next Steps:

- Work through the Project Charter and the requirements for the two projects labeled in the gap analysis.
- Upon Project Charter approval, dive into the processes and begin revamping the processes.

ONLINE LEARNING

Recommend a learning management system (LMS) to be used by all WesternU colleges.

Progress Made:

- ✓ Created a needs assessment to gain an understanding of the LMS needs from all colleges. Created a survey for potential LMS vendors based on the needs assessment results.
- ✓ Attended product demonstrations with LMS vendors such as Blackboard, Canvas and emedley.
- ✓ Met with medical schools, including UCI School of Medicine and Duke University School of Medicine, currently using LMS.

Learnings:

- Must accommodate requirements such as block scheduling, content searching, curriculum mapping and outcomes reporting. Closing this gap may require a combination of a LMS with custom-created features and third-party software.

Next Steps:

- Continue to meet with medical school LMS users/work with LMS companies for product specializations.
- Evaluate product features and cost to make a final recommendation.
- Create a plan for campuswide implementation.

DIGITAL RESOURCES

Optimize and increase digital resources for matriculating students.

Progress Made:

- ✓ Surveyed all nine colleges and identified areas of need as we move deeper into a digital age.
- ✓ Identified student experience as the intended outcome measurement of success.
- ✓ Broke digital users down into sub-groups for clarity. Input from students, faculty, and staff was obtained for each subgroup: The Pre-Student (pipeline), The Applied Student, The Matriculated Student, The Graduating Student, The Graduate (Alumni).

Learnings:

- For the pipeline (pre applicant), ensure that PSP are current and modern and attract the digital native.
- Flexible, high-tech, collaborative teaching spaces for small groups is the desired learning environment for the future.

Next Steps:

- Define "classroom of the future"
- Create survey as to what type of changes should be done in classroom; envision learners of the future.
- Consult resources at other long-established colleges that have remodeled their classrooms to determine how they've met these challenges, set up meetings with top management, evaluate needs assessment.
- Create plan for innovative classroom implementation, including cost analysis.

FINANCIAL PERFORMANCE TEAM

LEAN INITIATIVE

Institutionalize process improvement to make resources more available for WesternU's mission.

Progress Made:

- ✓ Identified and recruited Lean Champions across two campuses.
- ✓ Identified and contracted the appropriate Lean Six Sigma Green Belt (LSSGB) training program.
- ✓ Scheduled and trained 49 lean champions before the 2018 winter break.

Learnings:

- The team realized that many WesternU units have similar goals, and that through cross-unit collaborations, many positive achievements will be obtained. The Lean Champions are well on their way to earning their LSSGB certificates and are propelled to start their lean initiative efforts within their respective units.

Next Steps:

- Formation and structure of the Governance Committee and establishing policies and procedures.
- "Lean Check-in" is being developed and will capture all of Lean Champions' efforts and results.
- Develop a campuswide newsletter to provide communication and updates and to capture opportunities.

REVENUE GROWTH & DIVERSITY

Deploy revenue programs to reduce the University's dependency on tuition and to sustain growth.

Progress Made:

- ✓ Established consensus on the current/traditional state of revenue diversity at the University, brainstormed an initial set of new revenue opportunities, and conducted a thoughtful gap analysis of the difference between those two (the current/traditional reality and the reasonably-dreamed-of future potential(s)).
- ✓ Prioritized and selected a first revenue-growth project, and submitted a completed Project Charter.

Learnings:

- The University has to consciously strive to develop and pursue new revenue-producing opportunities that are, for the most part, non-tuition dependent.
- The University community needs more regular and effective internal communication to aid in the origination, maintenance, and stewardship of new revenue sources.

Next Steps:

- The RG&D subgroup is awaiting editorial feedback for this first Project Charter.
- Following those series of edits, the RG&D team looks forward to initiating implementation of the project steps laid out in our Charter.

BUDGETARY PROCESSES

Implement new budgeting processes and procedures according to best practices.

Progress Made:

- ✓ Determined the optimal way to implement zero-based budgeting at WesternU.
- ✓ Recommending that WesternU adopt zero-based budgeting (ZBB) for non-academic units and mission-based budgeting (MBB) for academic units.
- ✓ Conducted a literature review. Documents can be found on SharePoint.

Learnings:

- Most institutions adopting ZBB and MBB do so over several years, typically in a phased approach starting with a single or a few units at a time.
- The academic operating units should adopt mission-based budgeting methodology with academic support units adopting zero-based budgeting methodology. Recommended: a phased adoption of ZBB and MBB at the institution.

Next Steps:

- The team is awaiting editorial feedback for the submitted project charter.
- Begin the implementation of the project steps laid out in the project charter.

EXECUTIVE DASHBOARDS

Develop executive dashboards to create financial transparency and enable data-driven decision making.

Progress Made:

- ✓ Identified current and potential dashboarding and reporting software for various levels of management.
- ✓ Working with University Financial Services and Treasury on revenue, expense, and fund categories to facilitate the expansion of dashboarding and reporting at various levels of summary categories and detail.
- ✓ Worked with University Financial Services and Treasury to configure BudgetPak software for dashboarding capability.
- ✓ Established dashboarding and reporting pilot group to beta test BudgetPak dashboarding.

Next Steps:

- Continue taking inventory of needs, current software, and data to populate dashboards and reports.
- Test Tableau dashboarding software.
- Identify a list of recommended canned reports already available through current software for units to run on a periodic basis for executive management.
- After completion of dashboarding software testing, BudgetPak dashboarding will become available to Directors of Operations and Budget Coordinators.

BRANDING PERFORMANCE TEAM

UNIVERSITY AND COLLEGE-SPECIFIC BRANDING

Develop comprehensive marketing strategy to improve brand identity and awareness.

Progress Made:

- ✓ Assessed WesternU marketing landscape.
- ✓ Obtained Simpson Scarborough recommendations.
- ✓ Obtained Brand Identity Matrix from Harvard Business Review.

Learnings:

- No broad institutional agreement or support on brand identity and messaging.
- Marketing, even for general awareness purposes, is not and never has been a top- or even mid-level priority for the University.

Next Steps:

- Create a single Brand Project Charter for three focus groups (UCSB, Digital Optimization, and Analytics).
- Integrate Simpson Scarborough recommendations into roadmap and project charter.
- Roll out process for Brand Identity Matrix.

DIGITAL OPTIMIZATION

Build digital marketing infrastructure required to deploy the WesternU marketing strategy.

Progress Made:

- ✓ Conducted survey to unofficial and official marketing staff in colleges and departments.

Learnings:

- WesternU has a disparate collection of “small,” independently operating marketing resources, usually managed by staff who have marketing as a small component of their work.
- University has extremely limited central marketing resources, including little funding and only one dedicated marketing staff member.

Next Steps:

- Need a platform that will help a centralized marketing unit manage oversight of our currently decentralized efforts at WesternU – specifically social media and other kinds of branding and communication to external audiences.
- Create a unified project charter with brand group.
- Continue to research digital marketing platforms.

DIGITAL ANALYTICS

Create digital analytics dashboards to benchmark WesternU's digital footprint and support upcoming marketing efforts.

Progress Made:

- ✓ Conducted survey to determine method of analytics across campus.
- ✓ Held review of Google Analytics, added new member to team as a result.
- ✓ Gathered ideal KPIs and obtained Simpson Scarborough recommendations.

Learnings:

- The University currently has sparse distribution of digital analytics. The analytics are not used for decision making.
- Digital analytics is currently owned by the IT department rather than marketing.

Next Steps:

- Implement tracking Simpson Scarborough recommended KPIs.
- Build unified social and web analytics from all sources into a real-time dashboard.
- Work with brand group to create a single project charter.

INTERNAL COMMUNICATIONS

Develop communications and recognition programs to maintain momentum and achieve community-wide adoption of SPG initiatives.

Progress made:

- ✓ This report, "Achieving Aspirations, February 2019."
- ✓ Assisted President Wilson with monthly updates.
- ✓ Coordinated video production for Lean Champion celebration and Kaizen meeting. Created slideshow.
- ✓ Designed and produced Innovation Champion 3D printed pieces.
- ✓ Designed and produced Lean Six Sigma certification desk flags.
- ✓ Revised Cascade trajectory timelines.

Learnings:

- Internal communications will continue to be a critical part of strategic success, but will move forward as a function of the Global Strategic Performance team, since this team is closest to progress as it assists all teams.

Next Steps:

- Continue to produce reporting, methods of capturing vital progress updates.
- Continue to produce methods for WesternU leadership to show appreciation and recognition to teams and individuals.

INNOVATION PERFORMANCE TEAM

SERVICES AND RESOURCES

Create a culture of innovation at WesternU among all colleges and departments, faculty, staff, students and alumni.

Progress Made:

- ✓ Launched the Innovation Champions program and is in team-building phase.
- ✓ Determined traits that innovators possess, then created a list of ideal candidates who might best fit the personas.
- ✓ Hosted an introductory meeting with presentations by Dr. Ed Barnes, Nicholas Webb and Center for Innovation staff.

Learnings:

- The team needs data to assess the current culture and climate of innovation at WesternU.

Next Steps:

- Conduct focus groups to discover what innovation processes, support, and roadblocks exist at WesternU.
- The focus group participants will be members from the created list of names. Topics will include intellectual property, resources, innovation personas, incentive programs, and awareness of the WesternU process.

IP POLICY

Publish an Intellectual Property (IP) policy with approvals from all appropriate stakeholders.

Progress Made:

- ✓ A draft IP policy was approved by the group in December 2018 and has been forwarded to University Senior Administration for further consideration. The group is awaiting feedback and approval of the draft IP policy from University Senior Administration for further consideration.

Learnings:

- The IP Policy gap analysis identified key areas to be addressed to have a policy that operates in the best interests of the University and the originating inventors. These areas involve clarification of role definitions within the IP policy and pathways/processes. Most of these areas are in-process and may need to be revisited as the IP policy matures through the approval process.

Next Steps:

- Complete development of a transparent ticketing system for tracking innovations as they go through the process from conception to market. The "Innovation Pipeline" for use with the Center for Innovation is currently being researched by the IT department.
- Complete process for IP Policy approval.

PARTNERSHIPS & FOR-PROFIT VENTURES

Create and promote profit centers around WesternU's innovation initiatives to create new opportunities and revenue diversity.

Progress Made:

- ✓ Outreach has begun to build innovation partnerships between WesternU and other institutions of higher education, industry and health systems.
- ✓ Marketing brochures and presentations have been developed to share the story of WesternU and the opportunity our innovation initiatives can have for innovation sponsors.
- ✓ Launched WesternU Center for Clinical & Translational Research as a for-profit LLC.

Next Steps:

- Establish for-profit businesses to incubate and commercialize innovations developed at WesternU.

EDUCATIONAL INNOVATIONS

Build strategies around educational innovations to improve student outcomes and create products for commercialization.

The Educational Innovations team is newly formed and is currently in team-building phase. WesternU faculty working with the ITDL 3D and VR department have already been productive in developing proven learning technologies.

This team will focus on the development and commercialization of educational innovations primarily designed by WesternU, but will also actively seek partnerships with industry. Partnerships might include new development opportunities. The genesis of this team will encourage faculty to engage in innovation of learning-based technologies for their students and provide the opportunity for faculty and the University to benefit from commercial returns.

OTHER KEY INITIATIVES

Though SPG is the main motor for momentum for our future, several other strategic efforts are being addressed via parallel planning processes. These include assessments of our "state of play" to do with our culture of humanism and inclusion, as well as our configuration of research.

THE WESTERNU STUDENT EXPERIENCE



VIDEO ANTHROPOLOGY PROJECT

The Student Experience team interviewed 193 participants representing all nine colleges in its Video Anthropology project, to discover what students love about WesternU and where they would like to see improvements. The results were compiled into a gap analysis that informed project design and prioritization.

Among comments made by the student respondents, the strengths of WesternU that emerged were that students have a genuine connection to the university. “I love WesternU” was a commonly recurring statement. Their answers also reinforced that faculty are key to student happiness. The students are happy with faculty, seeing them as supportive, passionate, going above and beyond, giving one-on-one attention, and genuinely caring about the students.

While this is good news, understanding the needs for improvement to student experience is the goal, and the project uncovered the top areas of focus. They include: perception of imbalanced funding, access to healthy food, study rooms, building and classroom modernization, and safety. The team is now preparing proposals to address and solve these issues. Overall, WesternU has happy students, but we can always strive for improved experiences now and in the future.

STRENGTHS



Azaria Lewis

I LOVE WESTERNU

"I love the faculty. I love that the program is designed to stretch and grow you and they really respond to feedback of students we have an open platform to express our needs, wants, opinions. I really appreciate that."



Katherine Uong

FACULTY

"I really love the staff because they're really supportive and very approachable a lot of the professors have an open-door policy which I really find different from undergrad."

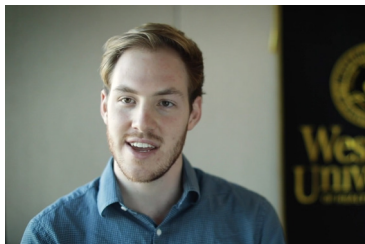


Eric Kiberu

ATMOSPHERE

"I love WesternU because I feel like it's a family atmosphere. Everyone's willing to help each other."

AREAS FOR IMPROVEMENT



Bryce Civic

UNIFY CAMPUSES

"Making it more inclusive of everyone across different schools and working more with different programs communicating between campuses some tool that can connect us."



Joseph Castro

AMENITIES

"I think what would also make the experience better is having a food court so that people can have a place to kind of eat and relax as well as potentially even having a recreational center."



Hannah Killian

LEARNING SPACES

"Students find it hard to find enough space to study on campus. Maybe more chairs, more tables, things like that, so that the public study spaces can be more accessible."

LEAN IN HIGHER EDUCATION LAUNCHED AT WESTERNU

Lean has as an ultimate goal identification of key areas of operations, and seeks ways to make improvements. The lean practitioner first creates a high-level process map and studies each stage in a process. This can uncover inefficient, unnecessary or extraneous steps as well as redundancies, errors, and opportunities to apply technology. When solutions create better efficiencies, faculty, staff, and students can spend time and resources on activities that matter most.

Lean Six Sigma (LSS) is a systematic and strategic approach to continuous process improvement. LSS is based on the principle of streamlining organizational processes to ensure they are effective and efficient. LSS helps redirect scarce resources and engages employees in even higher-level mission performance. LSS drives maximal return on investment for better success in mission objectives.

Lean and Six Sigma were originally developed by the manufacturing industry. However, as more and more industries recognize the power of the approach, they are implementing what they can use and

throwing out the elements of the system that do not apply. Higher education is one industry gradually adopting Lean Six Sigma with astounding results. The University of North Carolina-Chapel Hill, Harvard, Cornell, and the University of California, Berkeley are a few that have implemented Lean Six Sigma programs.

The American Society for Quality (ASQ) lists proven benefits of LSS in higher education:

- Meet accreditation requirements
- Provides a template for problem solving
- Promotes total involvement
- Helps establish measures
- Makes processes visible
- Focuses on the voice of the customer (internal and external)
- Identify and reduce hidden costs

If you are interested in learning more about Lean Six Sigma, reach out to a Lean Champion (listed in this report), or access Lynda.com courses available to all WesternU employees.



Dominique Cavallo, Cynthia Vasquez, Nicole Cathey, Marisabel Rodriguez, Suzanne Adolphson, Daphne Priddy, Chan Auth and Georgina Perez.



IMPROVE PROCESSES

"By discussing different processes and mapping them out, we have already created solutions for some of the problems we have. We already have a list of things that we are ready to work on."

Denise Cornish, Director of Enterprise Database & Integrations



STUDENT EXPERIENCE

"This will have a direct impact on the resources that we can allocate back to our students - to maintaining the classrooms and sustaining the University over the long term."

Mark Goggin, Senior Director of Operations, College of Pharmacy



FINANCIAL STEWARDSHIP

"This will generate great efficiencies for WesternU and perhaps cost savings. We will benefit from having improved processes, not only for the offices, but also for students."

Katherine Jiminez, Executive Director of Finance and Budget Administration

CASE STUDY: FACULTY TIME SAVINGS IN THE DENTAL CENTER

Lean Champion Suzanne Adolphson, MSW, MHA, is already realizing the benefits of her Lean Six Sigma training. She saw an opportunity for a project when the failure rate (patient no-show) for mid-level oral surgery rose to 5% higher than the general clinic. When a patient misses an appointment, precious faculty time is wasted.

Suzanne pulled together a team and created a charter for approval for the project. The team completed root cause analysis by brainstorming all possible causes to a patient not showing for appointments as crucial as surgery. They created a fish bone diagram and determined that the patients may not un-

derstand the importance of the appointment. They also identified patient anxiety as an issue, so they are proposing new protocol including a pre-surgical consultation and increased confirmations.

The team has identified key indicators for measurement and will track outcomes after implementing their changes in March. Suzanne says the LSS process is, "Very enlightening. The staff enjoyed working on this." She recommends Lean Champions start small by looking for improvement opportunities in their own area. Good luck to Suzanne and the team on implementation -- we look forward to the outcome!

MISSION-CRITICAL STRATEGIC DEPLOYMENT TECHNOLOGY



Clive Houston-Brown, EdD

VICE PRESIDENT AND CHIEF TECHNOLOGY OFFICER

WesternU welcomes Dr. Houston-Brown as part of the technology optimization mission-critical strategic deployment.

"I am honored to be selected for the position at WesternU and am excited by the opportunity to join such a fine institution. I have always been impressed with the growth and success of the university and have enjoyed interacting and collaborating with its leaders and students over the years. WesternU's mission and core values resonate with me; I look forward to becoming part of the team and participating in its continued success."



ASSESSMENT

Dr. Houston-Brown is reviewing recent Information Technology (IT) assessments and evaluating current organizational and functional structures within the IT department to determine the state of technology services and infrastructure. He is also identifying opportunities to leverage and redeploy existing resources to achieve current and future strategic goals.



OPTIMIZATION

Using best practice principles, Dr. Houston-Brown is determining ways to put in place methodologies and processes that will augment efficiency and optimize resource utilization. This could be achieved by leveraging technologies such as cloud-based platforms.



FUTURE READINESS

Given the strategic importance of technology in the current business, economic, and educational landscape, he is partnering with academic and administrative stakeholders to explore viable opportunities to leverage technological solutions, with the goal to contribute toward creation of a future-ready institution.

COMMITMENT TO REVENUE DIVERSITY ONLINE LEARNING

Online learning has the potential to extend WesternU's reach, engage digital-native students, and boost revenue diversity. Jonathan Daitch has been brought on board to lead the effort toward making online learning an integral part of the WesternU academic and cultural fabric.

Jonathan has met with key stakeholders across campus to determine and prioritize the "must-have" and "nice-to-have" features from a set of over 160 possible capabilities. After conducting an assessment of primary online learning tools currently in use at the University and the range of possible online degree- and non-degree-based offerings, he created a matrix showing the various priorities and opportunities to create online learning products. Together with the SPG Online Learning team, Jonathan will present his recommendation for moving WesternU's online learning programs forward.

EXPANDING OUR DIGITAL FOOTPRINT MARKETING ASSESSMENT

In November 2018, the SPG Branding Performance Team contracted Simpson Scarborough to conduct a marketing operations assessment. The team assisted by compiling marketing materials and coordinating interviews with 37 stakeholders including Board of Trustees members, President Wilson, deans, faculty, administrators and staff.

Simpson Scarborough determined that WesternU must fund and build marketing infrastructure because WesternU has ambitious goals. In addition, competition is quickly growing. The SPG Branding Team is using the 81-page report to develop one project charter that will recommend a new marketing structure that will establish a pathway to improved brand messaging, digital platform optimization, and a data-driven approach to campaigns.

ACADEMIC & FISCAL STRENGTH COMPETITIVE POSITIONING

WesternU should be very proud of program ranking scores returned from BKD CPAs & Advisors. BKD's goal is to help institutions of higher education "be financially stable and compliant with regulatory standards, so you can take advantage of opportunities, meet student needs and prepare for what's next."

All but one program ranked in the 95th percentile of all programs. Seven of the nine primary scored in the 98th percentile. Innovation in order to maintain a competitive advantage is clearly a focus at WesternU.

"The process of digital transformation of higher education is well underway regarding digital readiness, digital competency and, at many institutions, a digital curriculum."

"Most institutions of higher education recognize their brand is an asset that needs careful management."



"[Higher Education] institutions must redesign and recreate the economic model while finding new and innovative ways to become or remain financially sustainable."



EXECUTIVE DEVELOPMENT **BETTER** TOGETHER



STRATEGIC FILM FESTIVAL

SPG teams will deliver the stories behind their strategic objectives and their dedication to success in five short-format films. Talented film directors Raquel Borges, Edith Miranda, Dr. Ed Barnes, Dr. Elizabeth Rega, and Diana Lacey, along with WesternU's artful production duo Mirza Hasanefendic and Joe Marilo, will no doubt entertain, inform, and inspire you.



AWARDS & RECOGNITION

Every member of WesternU administration, faculty and staff is a special and valued contributor to the future of WesternU. Through the journey thus far in the SPG, some of these contributors have gone above and beyond with extra time, effort, and positivity. As we learned from Chester Elton, these individuals are more than deserving of some carrots.

MARCH 28, 2019 | DOUBLETREE BY HILTON POMONA

Special Guest, Ella Glasgow

Ella Glasgow has a special message to share with the WesternU community: **Better Together**. Ella is a vocal impact and performance expert who encourages teams to put some “show” into their work. Drawing from her 20-plus years on the professional stage, Ella infuses time-honored stage performance tactics into high-level institutions. Going straight to the heart of an organization, she teaches teams that every player must understand their “show’s” overarching goal to be successful. From this, she sparks individual creativity, confidence, and excellence to form a cohesive “show” that makes an impact and commands a repeat performance every time!



FUTURE READINESS

We have an opportunity to improve management systems and make WesternU an even better place to work. By borrowing best practices from within higher education and outside, WesternU will create efficiency and impact. The outcome: more value to our students and the communities we serve.



LEAN PRINCIPLES

Leaders of the Lean Initiative team will share the basic principles of Lean Six Sigma and how these will be adopted at WesternU to improve processes leading to better student and employee experience, as well as resource savings. One case study is already proving benefits in the dental center. You will learn why lean is for everyone and every organization - especially WesternU!

STRATEGIC ADVISORY COUNCIL

The Strategic Advisory Council provides objective feedback on the framework, methods of deployment, and organizational change management for WesternU's SPG initiative, as well as the Mission-Critical Strategic Deployment initiatives. Industry experts participate on a voluntary basis and enjoy the opportunity to share their insights for the betterment of our university.

In addition to group meetings, SPG leaders confer with individual members based on topic and expertise. Dr. Bill Bigler has provided helpful guidance on change management in higher education. Dr. De Leo has reviewed the Simpson Scarborough marketing assessment and is providing insight into building marketing infrastructure. Drs. Dean and Bray have offered advice on innovation and intellectual property (IP) from within other institutions

of higher education. Sean Stanton has consulted on communication needs for the strategic deployments. Dr. Palo shared how to make better industrial connections and offered introductions within the industry for our sponsorship program. The group will convene this summer to review SPG project progress and outcomes and again in the fall and winter to review Project Delta work.

INDUSTRY EXPERTS



SEAN STANTON

Board Liaison

Senior Vice President Global Operations, Research Network. Board of Trustees, Western University of Health Sciences. Founder of Compass Research. Bachelor's degree in Biology, University of Cincinnati.



DR. MATTI PALO

Orthopedic Surgeon. Founder and CEO, Palo Medical. Expert in direct response marketing and innovation commercialization.



DR. MACOLM DE LEO

Chief Evangelist, Quantifind. Previously, Chief Evangelist, NetBase Solutions. Global Vice President, Daymon Worldwide. PhD in Inorganic Photochemistry, University of California, Santa Barbara. MBA in Technology Management, University of Phoenix.



NICHOLAS J. WEBB

Nicholas J. Webb is a Certified Management Consultant (CMC) who designed the strategic framework for WesternU and oversees all aspects of implementation and measurement. Nick convened the Strategic Advisory Council as a means of obtaining objective, expert feedback.



DR. STEPHANIE BOWLIN

Dean Liaison

Dr. Stephanie Bowlin leads the Academic Performance Group and works with Nicholas Webb and the Center to build successful Executive Development events. These interactive events build skills in leadership, innovation, financial stewardship, managerial systems, and culture.



DR. JONATHAN LABOVITZ

Faculty Liaison

Dr. Jonathan Labovitz serves as focus area leader on the Global Strategic Performance Team, which is a support team for all SPG teams. This team provides feedback and guidance as the initiative progresses through phases of planning, deployment, management and control.



DR. BILL BIGLER

Strategic Consultant, Bill Bigler Associates. Previously tenured Associate Professor of Strategy and MBA Program Director, College of Business at Louisiana State University. President of the Board, Association for Strategic Planning. PhD in Strategic Management/Corporate Finance, Louisiana State University.



DR. JIM DEANE

Associate Director of Innovation Partnership Services, University of Oregon. PhD in Astrophysics, University of Hawaii, Manoa. MBA, Cornell Johnson Graduate School of Management.



DR. TERRY L. BRAY

Director of Technology Licensing, Georgia Tech Research Corporation. Previously EVP Business Development, Atherotech. Director, Physical Sciences, The UAB Institute for Innovation and Entrepreneurship. PhD in Chemistry, University of Alabama, Birmingham.

OUR DEDICATED SPG MEMBERS & CHAMPIONS

APPRECIATION AND RECOGNITION

Strategic Performance Group members are responsible for completing multiple phases of the strategic planning process. The teams are tasked with going beyond the work of a steering committee to deploy and manage projects, then mea-

sure and track the outcomes of the initiatives. In addition, many of the teams have extensions of support known as “Champions.” Participation at any level requires additional time and effort from day-to-day work. Please extend your deepest appreci-

ation and gratitude to the teams and champions as they work to build an extraordinary future for WesternU and all who benefit from this great institution.

ACADEMIC PERFORMANCE GROUP

Stephanie Bowlin
Beverly Guidry
David Baron
Dawn Stone
Dee Schilling
Edward Junkins
Elizabeth Rega
Esther Davis
Hector Arroyo
Jared Cox
Jeanine Mann
Jill Ferreira

Jonathan Daitch
Joshua Cameron
Karoline G. Almanzar
Katherine Staab
Maria Fahie
Mary Lopez
Melanie Barbee
Miary Andriamiarisoa
Mirabelle Fernandes Paul
Rodney Hicks
Sheree Aston
Tim Wood

FINANCIAL PERFORMANCE GROUP

Joshua McFarlen
Amy Padoongpatt
Bill Burrows
Carl Todaro
David Baron
Diane Abraham
Donna Fulton
Irma Sampson
John Pham
Julie Sarratt
Katherine Jimenez

Kevin Shaw
Mark Goggin
Nancy Riker
Raquel Borges
Raymond Garcia
Rick Leeper
Robert J. Warren
Rosa Aldama
Shawn McBride
Stephen Siegel
Vy Nichols

Names in bold denote group leaders and co-leaders.

BRANDING PERFORMANCE GROUP

Daniel C. Robinson	Joe Marilo
Anastasia Yakorkhina	Luke Rauch
Daniel Tatum	Mark Bottorff
Derrick Sorweide	Michelle Coiro
Desiree Hickam	Michelle Steinhebel
Donna Emanuele	Mirza Hasanefendic
Edith Miranda	Mitzi McKay
Elizabeth Hoppe	Rodney Tanaka
Eric Gupta	Shawn McBride
Eva Badouin	Shawna Federoff
Jeffery Keating	Thomas Fox

STRATEGIC PERFORMANCE GROUP

Phillip Nelson	Juan Ramirez
Jonathan Labovitz	Lisa Jimenez
Brenda Premo	Marcel P. Fraix
Brian Loveless	Matthew Durkin
Briana Young	Natalie Salaiz-Padilla
Denise Cornish (NeeCee)	Russel Heskin
Denise Wilcox	Shawna Federoff
Diana Lacey	Stacy Ku
Gail Evans	Thien Lieu
Gary Gugelchuk	Tina Meyer
Jeannie Davis	Trena Rich

INNOVATION CHAMPIONS

The Innovation Champions group is currently in development. If you are interested in this program, contact Dr. Ed Barnes or the Center for Innovation.

INNOVATION PERFORMANCE GROUP

Steven Friedrichsen	Nic Hayes
Edward Barnes	Nick Webb
Bradley Henson	Nissar Darmani
Brion Benninger	Pinakin Davey
Dean Smylie	Ruth Harris
Hubert Chan	Stacy Ku
Ivy Tuason	Stephen O'Barr
John Nguyen	Steven Henricksen
Miary Andriamiarisoa	Steven Snyder
Michel Baudry	Sunami Chun
Neil Patel	Traci Meyer

LEAN CHAMPIONS

Adriana Aguirre	Mark Goggin
Aileen Osborne	Melissa Quijano
Amy Padoongpatt	Michelle Coiro
Anandi Law	Nancy Riker
Anna Enriquez	Patricia Lozano
Arnold San Diego	Raquel Borges
Brian Loveless	Rashara Brown
Courtney Garcia	Raymond Garcia
Denise Cornish	Raymond Maeda
Donna Fulton	Raymond Raus
Edward Goering	Richard Lina
Guadalupe Soltero	Robert Warren
Irma Hebert	Rosa Aldama
Irma Sampson	Roy Guizado
Jonathan Labovitz	Shante Woods
Joshua McFarlen	Shawn McBride
Julie Sarratt	Stephanie Batte
Kassidy Fierro	Stephen Siegel
Katherine Jimenez	Suzanne Adolphson
Lori Suddarth	Tanisha Hampton
Louise Clark	Victor Tellez
Maribel Frias	Virginia Aguirre

UPDATE ON CENTER FOR INNOVATION

In fall 2018, the WesternU Center for Innovation completed onboarding of the Center team and fully launched operations. The Center has also been essential to the activities of our Strategic Performance Group (SPG).

The primary mission of the Center for Innovation is to impact the quality and value of education and patient care. A further mission is to create commercial connections for the WesternU community of innovators. After a great deal of deliberation and collaboration with the President and other key stakeholders, we have propounded Center for Innovation Strategic Pillars for 2019 and beyond. The Innovation Pillars include:

Startup Incubation

Many universities now have robust programs for entrepreneurship and innovation. However given that WesternU is a young university, it is not surprising such an infrastructure has not been built despite a legacy of innovative growth. Thus the Center is now developing an entrepreneurship program with free startup resources for students, faculty, and staff such as business and innovation consulting from Certified Management Consultants (CMC), design assistance, and content expert access. The Center also provides WesternU innovators opportunities to submit ideas to an innovation portal to vet and steward their projects toward commercialization.

Innovation Funnels

Given that WesternU is not a direct affiliate of a large teaching hospital, it must cast a broader net for innovations to incubate and transfer. Consequently, the Center is launching four national challenges to increase the volume of our innovations. This helps build the WesternU brand nationally while also

augmenting our pipeline of innovations.

Services and Resources

The Center for Innovation is a shared central university service that supports innovation and entrepreneurship. Faculty, students, and alumni can access all resources necessary to commercialize innovations and inventions. Our lecture series is the first WesternU curriculum for innovation and entrepreneurship. Our knowledge base, podcasts, and other resources provide easy access insights on how to leverage innovation to improve quality of care and provide economic benefit to our innovators and the University.

Certificate Programs

The Center for Innovation is developing an online certification program that is skills-based rather than theoretical. This unique approach delivers insights for applied innovation. The curriculum is being developed in collaboration with faculty by center Director Nicholas Webb. This leverages his decades of enterprise innovation research as vetted and augmented by faculty review and input. Certification programs in development include:

- Certified Enterprise Innovator
- Certified Healthcare Innovator
- Certified Healthcare Technologist

Revenue and Partnerships

The Center for Innovation supports the University goal to identify opportunities for revenue diversification. A novel sponsorship program is meant to find external funds for the center as well as specific initiatives, including underwriting Innovation Day and the Digital Health Lab. The center is also incubating new technologies with the express purpose of transferring them into commercialization. Our external partnerships aim to

bolster the University brand for innovation.

Shared Services

The center also provides traditional strategic excellence resources. These include a Shared Service Center, strategy and management consulting, and centralized project management through a formal Project Management Office (PMO) approach. We also are building infrastructure to assist colleges and the University in digital and content marketing, as well as social engagement and other key modalities, in this era of digital acculturation of all our students, both current and prospective.

WesternU Strategy

The Center facilitates faculty and staff in all manner of key strategic initiatives. In September 2018, the team recruited, organized, and launched the SPG. The introduction of modern managerial principles into academic cultures is well known to often seem initially disruptive. However, WesternU SPG teams are now planning, with great enthusiasm and determination, to launch major projects. It is a credit to all that such groundbreaking work has already earned peer-reviewed credit from major national organizations.

The Center — with these newly shared services — actively promotes the interests of students, faculty, and staff. These will ultimately well-position the University for sustainable growth over new horizons of critical mission impact.

Thus the Center helps propel WesternU on course to the ultimate vision of President Wilson.

We are, indeed, Achieving Aspirations.

INNOVATION PILLARS: OUR FOCUS FOR 2019

STARTUP INCUBATION

iVention
Brilliantly Healthy
Learning Logic
Project X
Interoperability Incubation

INNOVATION FUNNELS

Innovation Challenges

- IdeasForEyes
- InnoNurse
- Medical Device
- Mobile Health

WesternU Submission Portal
College Partnerships

SERVICES & RESOURCES

Digital Health & Entrepreneurship Lab
Innovation Events
Innovation Champions
Innovation Consulting
Design and Prototyping
Investor Sourcing
Interoperability

DEGREES & CERTIFICATIONS

Certificate Programs

- Certified Enterprise Innovator (CEI)
- Certified Healthcare Innovator (CHI)
- Certified Technology Innovator (CTI)

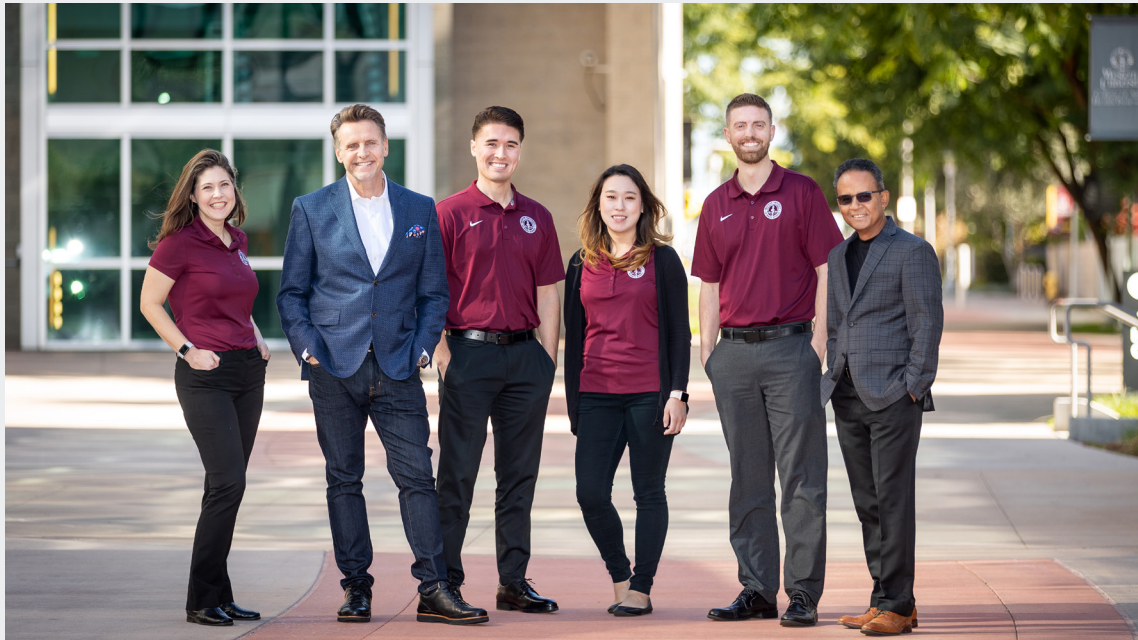
Innovation Leadership
Masters in Health Care Innovation
Physician of the Future

REVENUE & PARTNERSHIPS

Corporate Sponsorships
Partnerships
Philanthropy
Spin-offs
Co-Development
Government Grants

WESTERNU STRATEGY

Strategic Performance Group (SPG)
Digital Marketing
Project Management



Center for Innovation staff (left to right): Shawna Federoff; Nicholas J. Webb; Chris Weeks, MBA; Stacy Ku; Jesse Corrington; Miary Andriamiarisoa, EdD.

LEVERAGING TECHNOLOGY TO TRANSFORM TEACHING & LEARNING

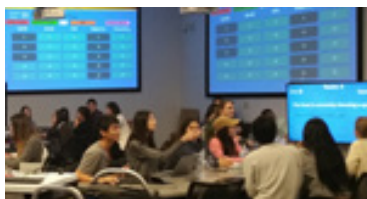
EDUCATIONAL INNOVATIONS



Miary Andriamiarisoa, EdD

**DIRECTOR OF INSTRUCTIONAL TECHNOLOGY AND DISTRIBUTED LEARNING (ITDL)
ASSISTANT DIRECTOR, CENTER FOR INNOVATION**

Rapid technological changes are affecting the educational arena. These transforming factors compel us to explore new teaching and learning modalities, as well as provide innovative ways to educate a new generation of learners. The ITDL department is leading efforts that will result in the strategic development and deployment of several technology platforms, initiatives, and solutions designed to meet current educational challenges by leveraging technologies to positively impact medical education.



CLASSROOM EFFICIENCY

ITDL's attendance app solution uses location-based technology to eliminate the need for manually taking class attendance. This solution greatly improves the use of classroom time, the accuracy of the attendance process, and the student educational experience.



FACULTY SUPPORT

ITDL's 3D printing lab is able to bring to life ideas from WesternU faculty when they identify an opportunity to help students grasp challenging concepts. Dr. Joshua Cameron's brain-eye pathways 3D learning model is a powerful example of WesternU's resources, expertise, and collaborative spirit.



COMMERCIALIZATION

By commercializing educational innovation developed for WesternU students, ITDL will boost WesternU's brand by marketing unique educational products as well as contribute to the university's strategic goal to become less dependent on tuition.

BUILDING A CULTURE OF INNOVATION

INNOVATION CHAMPIONS



*Dr. Ed Barnes, iSquad and SPG
Innovation Resources Leader*

The SPG Innovation Group and Center for Innovation have launched the Innovation Champions program. Champions will expand innovation expertise and enthusiasm into each college and department and will receive training and incentives for taking part in the program. Champions provide the following resources to their respective departments:

- Innovation training
- Startup lab resources
- Innovation vetting
- Entrepreneurship consulting
- Innovation sponsorship assistance
- Innovation challenges
- Leadership development activities
- Promotion, internal communications, and ambassadorship of CFI activities

A strong culture of innovation will prepare students to enter their careers with experience in emerging technology and empathetic design thinking.

COMMITMENT TO REVENUE DIVERSITY

INNOVATION PARTNERSHIPS



Partnerships and commercial sponsors are critical to the Center's ability to invest in the development of technologies, projects, and activities. Our partnerships will serve WesternU in boosting our brand awareness among other institutions of higher education, health systems and industry.

The Center for Innovation is reaching out to potential partners and sponsors to build mutually beneficial relationships. The Center and University Advancement will collaborate to bring the greatest possible benefit to WesternU. Early success shows interest from other universities' innovation centers to receive our developing lecture series and from banking institutions to co-develop entrepreneurship events.

With the expertise and resources at WesternU and across our partnerships, we have an exceptional opportunity to shape the future of health care.



Western University of Health Sciences

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