2018 - 2020
Strategic Plan

Berkeley Optometry
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Introduction from the Dean

I am delighted to present to you the UC Berkeley Optometry 2018-2020 Strategic Plan for your consideration. I ask for your ongoing support in reaching our many ambitious, but achievable goals.

This plan is the product of a process that started over a year ago. The process was inclusive, open to everyone’s ideas and thoughts, transparent, and was thoroughly debated at every step of its development.

The foundation for this strategic plan was created at the 2017 faculty retreat and continued with enthusiasm by the Steering Committee and Strategic Planning Committee, which represented every constituent of the school. Over the winter semester break, a draft of the plan was circulated to every person in the school and representatives of our alumni, to solicit their comments and ideas. Feedback was received from first year OD students, vision science PhD students, staff, faculty and alumni. Their comments were evaluated and integrated into the plan over the months that followed.

The plan integrates tactics and metrics in order to track our progress towards realizing our strategic goals. As such we have created a living document. We will be reviewing progress regularly, both in my office and at the unit level, and will dynamically update our tactics and strategies accordingly. Our plan will provide an external facing declaration of intent, and will inform every aspect of our internal decision making.

I would like to thank the faculty, staff, students, and alumni who participated in creating this important document. We are a strong community and this plan will both strengthen that community and maintain UC Berkeley Optometry’s hard-earned standing as the world’s leading clinical and scientific program.

John G. Flanagan
Dean and Professor, School of Optometry
Our Vision:
Preeminence and leadership in optometric education, patient care, and vision science.

Our Mission:
Advancing optometric education, clinical practice, and vision research for the benefit of society.
We Aspire to Excellence

- We are driven to achieve excellence and challenge convention in all we do.
- We will not rest on past accomplishments but will build on them to establish new standards for education, patient-care, discovery, and invention.
- We demand more of ourselves than of others and consistently strive to make choices and decisions with integrity and accountability.
- We aspire to exceed expectations.

We Embrace Diversity and Community

- We value and respect others and treat everyone with dignity and respect.
- We embrace the unique contributions of all members of our diverse community.
- We encourage diversity in our teaching, learning, and research.
- We support opportunities for continuous professional development to maximize individual potential and strengthen our optometric community.

We Promote Curiosity

- We believe that curiosity enables discovery and life-long learning.
- Our curiosity helps to remove cultural barriers.
- We gain new perspectives, creativity, and growth through curiosity.
- Our curiosity enables us to challenge convention.

Our Community Achieves Through Collaboration

- We challenge convention through creative collaboration both within and outside of our community.
- Collaboration improves patient outcomes, enriches education, fosters innovative research, and enables efficient operations.

We are Passionately Engaged

- Passionate engagement is caring more, risking more, and expecting more.
- We will passionately expand the boundaries of our knowledge and our profession.
- We promote a positive, energized, and optimistic environment to inspire others and ourselves.

Our Values & Guiding Principles

At Berkeley Optometry, we have long lived by guiding principles that define and differentiate us. As part of a world-renowned university that embraces excellence and access, we foster an environment of trust and mutual respect, free expression and inquiry, and personal resilience and achievement. We are strongly committed to diversity, respect for cultural differences, and promotion of social justice. These principles serve us daily in our reasoning and actions and aid us in our decision making.

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Education

Strategic Objective
Provide an exceptional education to: 1) prepare our optometry students and residents to deliver high quality vision care in a rapidly evolving health care system, 2) enable vision science students to excel in discovery, and 3) develop the leaders of tomorrow.

1. Further our excellence in didactic, experiential, and clinical teaching by continuously updating the curriculum to reflect the latest in research, clinical training, and the continuing integration into primary and interdisciplinary health care.

2. Provide a preeminent education that challenges convention, respects diversity, equity, and inclusion, inspires development within the profession, and produces future leaders in optometry and vision science.

3. Ensure integration and alignment of the clinical and basic sciences within the curriculum.

4. Ensure that excellence in curriculum renewal and implementation is supported by a state of the art library and other technology and electronic resources.

5. Develop online education for the core curriculum.

6. Ensure sufficient patient exposure and variety to develop clinical competency for optometry students and residents.

7. Ensure sufficient research experience to develop the capacity for performing independent research for vision science students.
Students

**Strategic Objective**
Recruit and retain highly qualified students and residents, contribute to a productive and supportive academic environment, and inspire a lifelong connection to Berkeley Optometry.

1. Admit and enroll student populations who embody our values of excellence, diversity, curiosity, collaboration, and passionate engagement.
2. Help provide a clear path for academic, clinical, and professional success.
3. Enable a lifetime of involvement with Berkeley Optometry.
Faculty

Strategic Objective

Ensure an excellent, diverse, equitable, and inclusive faculty to enable vibrant and exceptional optometry, residency, and vision science programs.

1. Actively recruit, hire, develop, and retain an excellent and diverse faculty.
2. Maintain an optimum student-faculty ratio.
3. Identify areas of current and future clinical and research needs that will ensure a faculty with a diverse knowledge base and future capabilities to challenge convention and further the profession’s contribution to society.
4. Identify, implement, and maintain a strong and vibrant career structure for clinician-scientists.
5. Prioritize and maintain high standards of teaching and mentorship.
6. Provide opportunities for growth and development of faculty in an interactive and collegial environment.
Research

**Strategic Objective**

Be a world leader in basic, clinical, and translational eye and vision research.

1. Provide a superior research and discovery infrastructure in a positive academic environment.
2. Increase research efficiency by leveraging University-wide resources.
3. Increase the funding of our research and discovery efforts.
4. Focus our scientific discovery in key areas of eye and vision research.
Clinic

Strategic Objective
Lead the field of optometric clinical education, while providing world-class primary and specialty vision care.

1. Deliver world-class primary and specialty vision care to our patients.
2. Be a recognized leader in the advancement of clinical and specialty vision care education.
3. Provide patients with expert, cost-effective visual solutions, and train students in the application of ophthalmic optics.
4. Continuously improve clinic processes to advance patient outcomes, student learning, and operational efficiency.
5. Recruit, retain and develop the best faculty and staff and empower them to enhance patient satisfaction, advance clinical teaching and research, and optimize operations and outcomes.
Development

Strategic Objective
Accelerate the School’s growth, leadership position, and preeminence.

1. Grow the annual fund and unrestricted fundraising efforts.
2. Develop and launch campaign themes coordinated with the UC Berkeley campus campaigns.
3. Grow the Partners in Education initiative.
4. Secure transformational gifts and ensure their long-term benefit for the School and the profession.
Alumni

Strategic Objective
Enable alumni to lead their community in knowledge, advocacy, and patient care.

2. Enhance alumni connection, collaboration, and leadership within the school and community.
3. Promote the achievements of our alumni community.
Continuing Education and Events

Strategic Objective
Increase the outreach, scope, and quality of professional accredited continuing education, and ensure quality event support to the School community.

1. Provide faculty and community optometrists with practical, evidence-based optometric continuing education.
2. Establish online optometric continuing education.
3. As the scope of optometry practice expands, provide education towards certifications for new treatments and therapies.
4. Provide quality venue and event support to our School community.
Administration

Strategic Objective
Ensure school-wide effective business planning, implementation of best practices, strategic resource allocation, and performance management.

1. Streamline business processes, increase accountability, and implement best business practices.
2. Ensure successful implementation and execution of the strategic plan through effective communications and management.
3. Recruit and retain a high performing and diverse staff.
4. Actively engage with UC Berkeley and other UC campuses to leverage and share expertise on best practice, processes, and systems.
Communications

Strategic Objective
Enhance Berkeley Optometry’s institutional reputation, optimize its brand equity, and sustain awareness.

1. Promote Berkeley Optometry’s excellence in optometric education, clinical practice, and vision research.
2. Develop public recognition and awareness of our primary and specialty clinics’ eye care capabilities.
3. Enhance our communications infrastructure and processes.
4. Provide excellent communications support to the Berkeley Optometry community.
Finance

**Strategic Objective**
Provide innovative, collaborative, client-focused financial, analytical, and strategic decision support.

1. Align financial resources to support unit strategies.
2. Simplify and standardize business processes to ensure policy compliance and audit readiness.
3. Establish key performance indicators for each unit and leverage data for strategic decision support.
4. Engage unit managers in the annual budget process and in ongoing continuous improvements.
5. Ensure that our teaching, patient care, and research infrastructure supports our mission.
Acknowledgements

Thank you to the faculty, staff, students and alumni who served on the steering and the strategic planning committees.

And a special thank you to Eric Leal and Dennis Reker. Eric, our Former Assistant Dean of Administration and Finance, initiated the strategic planning process in the spring of 2017. Part of that process was hiring an organizational consultant to assist us with this critical endeavor. To our delight, Eric partnered with Dennis Reker, a former senior executive for Intel Corporation who leveraged his management, planning, and organizational development skills to help us visualize and advance the strategic priorities of our institution. The impact of this partnership will have a lasting impact on the school.

Steering Committee

- John Flanagan, Dean and Professor, School of Optometry
- Christina Wilmer, Associate Dean, Clinical Affairs
- Michael Silver, Professor of Optometry and Vision Science
- Nancy McNamara, Associate Professor, Clinical Optometry
- Monica Porter, Assistant Dean, Operations
- Meg St. John, Assistant Dean, Admissions and Student Affairs
- Dennis Reker, Organizational Consultant

Strategic Planning Committee

- Annie Yeh, Executive Assistant
- Billie Beckwith-Cohen, PhD Student
- Christina Wilmer, Associate Dean, Clinical Affairs
- Courtney Louie, UCOSA President
- Dennis Levi, Professor of Optometry and Vision Science
- Dennis Reker, Organizational Consultant
- Eric Craypo, Director of Communications
- Eric Leal, Former Assistant Dean, Administration and Finance
- Gunilla Haegerstrom-Portnoy, Associate Dean, Academic Affairs
- Harry Green, Director of Digital Health and CE
- John Bui, OD Student
- John Corzine, Clinical Professor
- John Flanagan, Dean and Professor, School of Optometry
- John McNally, Alumni Board Member
- Karsten Gronert, Professor of Optometry and Vision Science
- Kelly Byrne, PhD Candidate
- Kerri Yoshiyama, Assistant Clinical Director
- Kristen Williams, Assistant Dean, Development and Alumni Relations
- Kristine Eng, Alumni Board Member
- Kuni Kanai, Assistant Clinical Professor
- Lyuda Martello, Director of Continuing Education and Events
- Kyle McCarthy, OD Student
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- Meng C. Lin, Associate Professor, Clinical Optometry and Vision Science
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- Rob Herrick, Clinic Manager
- Sharon Joyce, Former Assistant Dean, Admissions and Student Affairs
- Stephanie Tran, OD Student
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- Suzanne Fleiszig, Professor of Optometry and Vision Science