



# Performance Appraisal

April 1, 2020 – March 31, 2021

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# 1

## Major administrative challenges

Describe the major administrative challenges you faced and how you dealt with them (maximum 2 pages)

Several years ago I concluded my performance appraisal with the following statement:

**“Our primary function is to provide exceptional support services to our students with the intention of enhancing their educational success. Our current challenge is to maintain our professional and emotional vitality in order to fulfill this charge when we are forced by necessity and current events to be reactionary instead of visionary.”**

Little did I realize when I wrote these words that we were just a pandemic away from testing the depth of our resolve to fulfill this commitment. In the midst of the SAR-COVID2 pandemic the BSOM – along with the rest of the world - had to creatively pivot to prepare for the unknown challenges that threatened the interruption or deterioration of student service operations. Over the course of this performance appraisal period I would prefer to focus less on my personal achievements than on the collective fortitude exhibited by the staff, faculty, students, and community who endured unimaginable personal life situations to minimize any academic interruptions to our student’s educational progress, and advocated to get our students in the Doctoring and Advanced Doctoring phase of the WrightCurriculum back into the clinical education environment.

Corporate research has confirmed that a common denominator of America’s most successful organizations is that they prioritize the customer focused service product being provided as their prime directive. However, the emotional welfare of their employees ranked a very close second. In the Office of Student Affairs and Admissions our produces are the services we creatively provide to the BSOM students. Due to the University’s existing fiscal crisis we were unable to offer our employees increased industry wages and benefits as a means of expressing our appreciation for their unprecedented service during unprecedented times. Instead it equated to an intentional investment, years earlier, in providing each employee with a consistent currency of professional value and emotional relevance. Thus we arrived at the brink of the pandemic with a fortified awareness that as a cohesive unit who has been through many things, we could get through anything.

One of my many community service activities is serving as a member of the East End Community Service board of directors. We begin each meeting by reciting the following ancient Chinese saying: “Go to the people. Live with them, Learn from them. Start with what they know; Build on what they have. But with the best of leaders, when the work is done, the task accomplished, the people will say **“We have done it ourselves.”** This is precisely the philosophy that has served us well at the BSOM. The “people” are our students and our staff. As a “people manager” I have invested heavily over the years in providing both our students and staff with a sense of value and relevance.

As our students arrive and depart as graduates I continue to seek creative methods to connect with them in an effort to recognize their ever changing needs. These needs are often fueled by the intellectual stresses of surviving an appropriately demanding medical school curriculum. Although challenging, advocating for and working with the student is one of the most enjoyable aspects of my duties as an associate dean. The priority of managing personnel issues is a major administrative challenge in any corporate setting.

We are at our best when we are with our students. Despite the virtual barriers the pandemic has imposed upon our systems, we have learned how best to use technologies and improved our capacities of using personalized digital communications to bridge the mandated distance between us. This week when I was speaking with a third year student - who had returned from a leave of absence to complete a MPH degree - about her future plans after graduation, I realized that the ancient Chinese philosophy I mentioned earlier remains as relevant in the 21<sup>st</sup> century as it did 2000 years ago. She shared with me how much she learned to genuinely appreciate the BSOM systems of support once she got away from the echo chamber of complaints from her classmates. She confessed that although our support systems seemed bothersome, haphazard and at times absent, she now understood how much “grace” the BSOM had provided her and her peers. In regard to my staff, I also know that I have fulfilled the unknown philosopher’s vision when I can hire good people, give them a course direction towards providing incredible service to our customer, step back and let them say, **“We have done it ourselves.”**

I tend to be that guy in the room who annoys everyone with his optimistic view of the future despite the bleak evidence indicating otherwise. We continue to serve our increasing numbers of students with a diminishing number of staff who possess the institutional knowledge required to do their assigned duties. The Office of Student Affairs – and other University units - have absorbed the proverbial body blows of personnel lost by required early retirements, voluntary retirements, reassignments (e.g. IT division), or in one tragic case - death. The remaining OSAA staff spent most of 2020 multitasking wherever the needs presented. The prime directive was to not allow critical student services or the perception of excellence to be diminished in the eyes of our current students or the candidates vying for admission. Managing this process was without a doubt the greatest administrative challenge I have experienced during my career at the BSOM. Unforced human errors were kept to a minimum. However, it was emotionally bruising when errors that did occur left OSAA staff members, who take great pride in achieving excellence, would be accused of doing a substandard job because of circumstances beyond their immediate control. As their leader I justifiably have echoed their frustration with not “feeling the love” from the BSOM for giving 110% of their effort.

I look forward to leaving behind this era of simply being reactionary in an effort to survive the day. Our desire is to have an opportunity to become exceedingly visionary, so that we can evolve to our next level of excellence. This will benefit our students, our staff morale, the BSOM, and the community we serve.

# 2

## Your unit's major accomplishments

Provide an outline that describes your unit's major accomplishments. (Maximum 2 pages)

The major accomplishments of my unit in 2020 and the first portion of 2021 are noted in section three of this performance appraisal document. It can be summarized by stating that we began the year being asked to do an improbable task with limited staff and limited funding, while serving more students and providing more services in the presence of a public health emergency. The bottom line is that our team has accomplished the unimaginable during this ongoing PHE. However, there were certainly several speed bumps and potholes to avoid in the virtual work environment. Many of these obstacles were external of the BSOM - such as issues of social, political, economic, and racial unrest. One personal major heavy lift was heading up the establishment of the BSOM COVID-19 Task Force to create ongoing policies and procedures for our students to follow upon their return to campus and clinical duties in June 2020. This was followed by a successful mass COVID-19 screening for all students returning from winter break in January 2021 and the coordination of our students receiving their COVID-19 vaccination series when supplies became available.

I have stated in the past that the sign of a "good" unit is that they get the basic job done well each day. The sign of a "great" unit is that they get the job done each day and make it look easy. In the presence of a PHE it was extremely difficult to make any previously routine process look easy. It took a "great" OSAA staff united in our efforts to get the job done for our students every day. Every member of the OSAA continued to exhibit grace in the presence of enormous shifting obstacles placed before them. Although diminished, we continued to promote a culture of innovation, self-examination, and professional growth. We continued to perform our duties while remaining within our forecasted budget. We attempted not to point fingers, divert blame, or throw others beneath the preverbal bus as personal emotions became increasingly raw.

Dr. Roman and I continue to work together to provide a unified voice to our student body. Through the use of webinars we continue to meet with the four class presidents and the president of the Medical School Student Council (MSSC) each term to receive formative feedback regarding class-specific issues. I also used this medium to meet with our BSOM representative to the WSU Student Government and members of other established BSOM medical student groups who requested guidance from the school administration. The PHE has revealed how this virtual medium can be used as an invaluable tool to garner "real-time" information about concerns our students are having regarding their educational experience at the BSoM. I have found these sessions helpful to create course corrections for improved student success and resilience.

Our unit continues to be a supportive environment, placing the emotional well-being of our students in the forefront of our efforts. We are exceptionally proud of the fact that

the BSOM is the home of the Remen Institute for the Study of Health and Illness. This sets the stage for our students to value life balance. These efforts blend nicely with the series of resiliency training seminars Dr. Kimberly Gilliam continued to host until the PHE caused them to be postponed indefinitely. These self-help sessions averaged over 50 students participating in such seminars as meditation, nutrition, yoga, culinary skills, etc. Students completing a designated number of these wellness management/resiliency seminars received a certificate of completion from the OSAA. We continue to provide our students with at least seven (7) alternative methods of communicating “just in time” concerns to the administration (Accolades/Concern Portal; Student Mistreatment Hotline; WSU Bias Incident Response Team; Appointment with Dr. LeRoy; Appointment with Dr. Roman; Report to their class Honor Code representative; BSOM Ombudsperson). Our students continue to use the confidential behavioral health counseling services provided by the BSOM Department of Psychiatry and the WSU Counseling and Wellness services.

Once again we were successful in recruiting a great group of students for the Class of 2024. We are currently on schedule to matriculate another quality group of students for the Class of 2025. It takes a village of nearly 50 volunteers, who make up the BSOM Admissions Committee, to personally review hundreds of applicants to find 130 unique individuals who will matriculate in July to join the Class of 2025. As you are aware, an admissions committee appointment is very time consuming. As many of our legacy members of the Committee retire I am not finding new members who are as dedicated to the level of work necessary to carry out the duties necessary. With the forced retirement of Ms. Teresa Rickey at the end of November 2020 our dedicated admissions staff was reduced to two individuals. Because of the PHE we could not draw upon students from the University to fill in the administrative gaps created by Ms. Rickey’s absence. This resulted in unassigned OSAA staff, and even DME administrators (Thanks to Drs. Parmelee and Roman), being drafted to do interviews and various administrative tasks. I applaud every member of the OSAA who did an incredible amount of work to make the magic happen.

In June of 2020 my assistant dean of diversity and inclusion, Dr. Kevin Watt, voluntarily resigned after 12 years of service in this position. Due to the efforts of Dr. Watt, Ms. Lakia Young, and Mr. Mel Brown, in our Office of Diversity and Inclusion, we continued our nationally recognized success in recruiting a diverse class of medical students. In the Class of 2024 26% (31 of 118 new matriculants) of our students met the AAMC classification of underrepresented in medicine. During the admission season we continued placing additional focus on recruiting individuals who will be candidates for our Wright Rural Scholars Program at Grand Lakes St. Mary’s and the newly established Bridge Program initiative. We anticipate having six (6) Bridge Program participants matriculating with the Class of 2025.

In 2019 we celebrated the 40<sup>th</sup> anniversary of our Horizons in Medicine (HIM). The HIM programs was founded with the intent of being both a community service and pipeline recruitment program for students of color and/or economically disadvantaged high school students interested in medically related career opportunities. Due to the PHE HIM was placed on hiatus in 2020. We are currently in the process of recruiting students to participate in a 2021 hybrid version of the program.

I personally continue to be active in my clinical practice at East Dayton Health Center ~10 hours/week and involved in a wide variety of community support activities that range from service with Public Health Dayton and Montgomery County (having just completed a 15 year term of involvement), Hospice of Dayton and Ohio's Hospice, Dayton Public Schools, American Academy of Family Physicians (immediate past President and current Board Chair), and the East End Community Board, just to name a few

# 3 Your own major accomplishments

Provide an outline that describes your own major accomplishments: (Maximum 2 pages).

What follows is a list of 2020 Office of Student Affairs and Admissions and personal accomplishments in no prioritized order. **Bolded** items are noteworthy accomplishments:

- **Participated in the support of the WrightCurriculum**
- **Created a new organizational matrix for the OSAA**
- **Weekly meetings (Thursday) between OSAA and DME supervision to coordinate student service and education efforts**
- **Work in concert with Associate Dean of Medical Education to effectively manage the student experiences**
- **Multiple webinars with students to discuss social and/or curricular matters of concern**
- **Establishment of the**
- Support of special interest projects for students (letters of recommendations, Resilience training, national and regional student election opportunities, etc.)
- OSAA finished the year under budget and addressed fiscal stewardship concerns
- **Faculty advisor for local chapter (Alpha Upsilon) of Phi Rho Sigma Fraternity.**
- **Faculty advisor for newly established White Coats for Black Lives – BSOM Chapter**
- Vice President of Phi Rho Sigma Medical Society Grand Chapter
- Staff physician service at East Dayton Health Center
- Continued to expand medical student career development services for BSOM medical students
- Support of students traditionally underrepresented in medicine
- **Member of the Ohio Health Physician Diversity Scholars Program executive board**
- **Faculty participation in the Healer’s Art curriculum**
- Continued efforts to expand clerkship opportunities in Grand Lake St. Mary’s region
- Work with Gem City Medical, Dental, and Pharmaceutical Society
- Provided undergraduate student mentorship
- Medical student mentorship
- Class Presidents meetings each term - Virtual
- Successful year of recruiting Class of 2024
- Successful Pre-matriculation program - 2020

- Successful management of NRMP and SOAP (Supplemental Offer Acceptance Program). **Only 2 eligible students remained unmatched in 2021. All eligible students were placed in 2020.**
- Successful virtual freshmen orientation for the Class of 2024
- Biannual debt report cards, money management and budget counseling sessions for medical students
- **Continued to support the Choose Ohio First primary care scholarship program (30K annually) – Note: This program is being phased out**
- Medical student ombudsperson services (provided by Kimberly Gilliam) are being used by students on a regular basis
- **Ongoing monitoring of the BSOM Accolades/Concern Portal**
- Monitoring updates to the Medical Student Policy and Procedure Manual
- Participation in Continuing Quality Management committee
- **Managed \$1,378,951 of BSOM scholarship awards and ~ \$21 million in loans for matriculating and current medical students**
- **Assisted students in their efforts to receive national appointments and recognitions**
- Continued to successfully matriculate applicants classified as underrepresented in medicine
- **Racism in the Clinical Space Webinars for students**
- **Black Men in White Coats – Film screening during Black History Month**
- **Women Faculty Seminar – March 2021**
- Continued to address issue of clerkship overcrowding and capacity-building
- Continued expansion of the data management and capabilities of the AAMC WebAdmit program
- Participation in the BAMS integrated Curriculum Management System training for the BSOM
- Updated employee digital desk procedure manuals
- **Appointed a new assistant dean Diversity, Equity, and Inclusion – Dr. Eric Taylor**
- **Enhancement of the Office of DEI services, with its intentional inclusion at multiple layers of BSOM administrative leadership**
- Completed pilot testing year with the AAMC WebAdmit database
- **Coordinated the first virtual BSOM graduation ceremony – 2020**
- **Coordinated the first virtual BSOM Match Day – 2020**
- **Coordinated the first virtual BSOM Convocation/White Coat Ceremony**
- **All LCME deficiencies from 2017 site review warnings officially resolved**
- **American Academy of Family Physicians – President and Board Chair**
- **Co-Chair of Oregon District Tragedy Fund – 2019-20**
- **Published the book: Quotes From the Edge of Nowhere – The Art of Noticing Unnoticed Wisdom.**



# 4

## Your professional goals for the next academic year

List your professional goals.

**EDUCATION GOAL:** Advance learning experiences that prepare learners for the medicine of tomorrow.

**Culture Statement:** We value innovative, interdisciplinary, efficient, effective, mutually supportive, and collaborative education that broadly engages our student, academic, and surrounding communities

- Work with the Office of Advancement to secure additional student scholarship funding for our increasing class size
- Work with the Office of Advancement to expand scholarship opportunities for qualified students who are underrepresented in medicine
- Secure adequate staff and fiscal resources for essential OSAA operations
- Continue dialogue with faculty and students regarding student success strategies
- Work with our LCME compliance official (Colleen Hayden) to continue the monitoring or repair of real or perceived accreditation deficiencies
- Succession planning for the OSAA
- Advocate to secure new sources of scholarship monies reserved to support our students
- Continue donating to my BSOM scholarship fund.
- Continue to work with DME on Wright Curriculum development.
- Recruit 130 qualified applicants traditionally underrepresented in medicine for the Class of 2026
- Coordinate increasing the anticipated matriculating class size to 140 in 2023
- Maintain the number of qualified out of state students at ~20% of class
- Continue efforts to offer personalized Budget and Finance counseling seminars for medical students to decrease student indebtedness
- Participate in expanding the number of opportunities for at risk students to receive early and continuous academic counseling
- Continue to expand our system of monitoring student academic and professional advancement, via our academic advisor and appropriate referrals for interventions
- As our secondary applications increase, further refine the preadmission committee (PAC) screening with clear parameters for ranking applicants and granting interviews using the AAMC WebAdmit database
- Support enhancements of student mental health interventions, counseling, and treatment options
- Update and refine summer enrichment programs (i.e. Horizons in Medicine and Prematriculation programs). Successfully bring Horizons in Medicine back on line

- Continue annual review and updates of employee desk manuals
- Assess OSAA programs and services for continued relevance and level of success
- Determine best practices for bringing all OSAA in person systems and services back online after the PHE has ended.
- Determine most fiscally sound and best practices for the use of admissions secondary fees (\$80/applicant) to support admissions and student services
- Successfully plan and manage the 2022 BSoM graduation ceremony
- Enhance the BSOM Diversity, Equity, and Inclusion programming, messaging, WSU collaborations, and student support services
- Participate in the search committee to select a BSOM Vice Dean for Educational Affairs
- Find the time and the space to truly be innovative - again

**PATIENT CARE GOAL:** Prepare for and create the future of patient care.

**Culture Statement:** We value people of all types from diverse communities and will serve our patients with gratitude, professionalism, and overall clinical excellence in a way that advances the education of our students, residents, and faculty.

- Continued involvement in student clinical teaching opportunities
- Maintain medical licensing and professional certifications
- Maintain courtesy medical privileges at Miami Valley Hospital
- Ongoing clinical practice involvement at East Dayton Health Center
- Volunteer service as Chief Medical Consultant for Dayton Public Schools
- Active participation with the BSoM Department of Family Medicine
- Continued involvement in community COVID-19 support activities

**COMMUNITY ENGAGEMENT GOAL:** Strengthen community education, community partnerships, and academic partnerships.

**Culture Statement:** We value people, our BSoM and WSU colleagues, and our partners as part of the broader community we serve. We wish to imbue our future generations of physicians and medical researchers with this same belief in the value of service and partnership.

- Conclude service on the American Academy of Family Physicians Board of Directors
- Service on the Ohio Academy of Family Physicians Board of Directors
- Service on the Ohio's Hospice Board and Hospice of Dayton
- Service on the Dayton Contemporary Dance Company Board of Directors
- Service as the Chief Medical Consultant for Dayton Public Schools

- Conclude service on the Mound Street Academies (Drop Out Recovery H.S. - Board of Directors – This school will be transitioning to a Dayton Public School affiliation
- Service on the East End Community Service/WestCare Board of Directors
- Service on the Levitt Pavilion Dayton Board of Directors

**RESOURCE GOAL:** Maximize revenue sources and enhance the performance of our fundamental operations.

**Culture Statement:** We value free exchange of ideas to advance the best infrastructure possible, through financial management, smart policies, pursuit of external support, and having partnerships with our excellent staff, students, and faculty.

- Work with the DME and Office of the Dean to improve structural and fiscal efficiencies between the units.

# 5

## The goals you propose for your unit for the next academic year

List the goals you propose for your unit.

**EDUCATION GOAL:** Advance learning experiences that prepare learners for the medicine of tomorrow.

**Culture Statement:** We value innovative, interdisciplinary, efficient, effective, mutually supportive, and collaborative education that broadly engages our student, academic, and surrounding communities.

- Dialogue with faculty and students regarding student success strategies
- Working in concert with our LCME compliance official to continuously monitor and document LCME requirements
- Succession planning for the OSAA
- Further enhance the integration and services provided to the school, WSU, and the community by the BSOM Office of DEI
- Advocate for new sources of scholarship monies reserved to support students
- Update appropriately vetted policies and procedures in the BSoM Medical Student Policy and Procedure Manual
- Continue coordinated work with the DME to advance the Wright Curriculum development
- Recruit qualified applicants traditionally underrepresented in medicine for the Class of 2026
- Update admissions procedures to utilize the full capabilities of our WebAdmit module
- **Hire strategically essential personnel to staff our Office of Admissions**
- Maintain the number of qualified out of state students at >20% of class
- Do a logistics needs assessment for the “Doctoring” phase of the WrightCurriculum i.e. Assist in identifying new clinical sites for our students
- Work with the Office of Advancement to expand scholarship opportunities for qualified students
- Continue efforts to offer personal Budget and Finance counseling seminars for medical students to decrease student indebtedness
- Monitor opportunities for at risk students to receive early academic counseling
- Update summer enrichment programs (i.e. Horizons in Medicine and Prematriculation programs)
- Review and refine OSAA programs for continued relevance and level of success
- Successfully manage the hosting of the 2022 BSoM graduation ceremony

**COMMUNITY ENGAGEMENT GOAL:** Strengthen community education, community partnerships, and academic partnerships.

**Culture Statement:** We value people, our BSoM and WSU colleagues, and our partners as part of the broader community we serve. We wish to imbue our future generations of physicians and medical researchers with this same belief in the value of service and partnership.

- Expand networking opportunities locally, statewide and nationally that will strengthen our educational opportunities for our students (i.e. clerkship assignments, residency match opportunities, research, and prospective scholarships)
- Continued presence at clinical education sites to enhance opportunities for community partnerships

**RESOURCE GOAL:** Maximize revenue sources and enhance the performance of our fundamental operations.

**Culture Statement:** We value free exchange of ideas to advance the best infrastructure possible, through financial management, smart policies, pursuit of external support, and having partnerships with our excellent staff, students, and faculty.

- Expand and refine programs that contribute to increased cost effectiveness within the OSAA and student success outcomes
- Provide innovative process improvement leadership
- Use benchmarking evaluation protocols to grade our successes and identify areas requiring improvement in efficiencies within the Office of Student Affairs (i.e. survey participant outcomes for all major OSAA events)
- Complete any necessary integration of the final phases of BAMS into the OSAA standard operating procedure work plans