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American **AOAO** Academy of Orthopedics

Strategic Plan – February 2011

In the Spring of 2010, the AOA retained Tripp Umbach, an nationally recognized independent healthcare consulting firm based in Pittsburgh, PA to facilitate a strategic planning process to guide the organization over the next three to five years.



Introduction

The Plan at a Glance



Mission, Purpose and Benefits Statement

Strategic Priorities and Recommendations

Next Steps and Evaluation

Appendix A-E (Secondary Data)

Mission Statement



The American Osteopathic Academy of Orthopedics (AOAO) facilitates the finest training and continuous development of Osteopathic Orthopedic Surgeons (OOS) to positively improve the care, healing and quality of life of patients

Strategic Priorities and Recommendations

**Education
Process**

Advocacy

Outreach

**Professional
Development**

**Academy
Resources**

The strategic planning process outlined in this document is organized in five priority areas – education process, advocacy, outreach, professional development and academy resources. The plan includes strategies and recommendations for advancement in each of these five areas.

Overview

Strategic Priorities and Recommendations

Education Process	Advocacy	Outreach	Professional Development	Academy Resources
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1. The Continuing Medical Education Planning Committee can do the following to continue to provide and improve CME by evaluating the following:
 - a. Annual meeting location, meeting hours, and content, including quality of speakers and resident involvement
 - b. The benefit of hands-on programs and simulation labs and the resources needed to provide such programs

Strategic Priorities and Recommendations

Education
Process

Advocacy

Outreach

Professional
Development

Academy
Resources

2. Evaluation and/or improvement of current Residency Program
 - a. Taking necessary steps to have full ownership of evaluation committee including residency training
 - b. AOA paid reviewers supplemented by AOAO orthopedic clinician involved during residency accreditation process
 - c. The maintenance/upgrading of “free” resident logging services that are currently offered

Strategic Priorities and Recommendations

Education Process	Advocacy	Outreach	Professional Development	Academy Resources
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1. Strengthen partnerships with appropriate organizations such as the and AOA and AAOS to advocate for members and residents at the federal level.
2. Create a working group consisting of the Publications Committee, the Executive Director and the government affairs consultant to create an Advocacy “Tool Kit” for members to use at the state and local levels
 - a. Talking points with consistent messaging (White Paper)
 - b. Proven strategies for reaching elected officials
 - c. Create a “Member Dropbox” account on the Academy’s website to facilitate information-sharing related to strategies for advocacy etc.
 - ✓ <https://www.dropbox.com/install>
 - ✓ Refer to Appendix D

Strategic Priorities and Recommendations

Education Process	Advocacy	Outreach	Professional Development	Academy Resources
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3. Continue engagement with Government Affairs Consultant
 - a. Continue and strengthen (through Orthopod and website) relationship with ACOS and the government affairs consultant to represent Osteopathic Orthopedic Surgeons.

Strategic Priorities and Recommendations

Education Process	Advocacy	Outreach	Professional Development	Academy Resources
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1. The Residency Liaison Committee and the RAOAO members to work to strengthen the relationship with residents, resulting in:
 - a. Improving and strengthening ties with residents to increase resident awareness of the Academy
 - b. Retaining resources or assign to current member to take responsibility for utilizing/updating social networking i.e. Facebook, Twitter, LinkedIn, etc.
 - c. Evaluating the current Resident Association “RAOAO” objectives and activity
2. AOA Website
 - a. Continue working to build, maintain, and upgrade the website

Strategic Priorities and Recommendations

Education Process	Advocacy	Outreach	Professional Development	Academy Resources
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3. The Publication Committee work to create a one-page “AOAO At-a-Glance” sheet that can be uploaded to the AOAO website and distributed to members and future members
 - a. Please refer Appendix E for examples

Strategic Priorities and Recommendations

Education Process	Advocacy	Outreach	Professional Development	Academy Resources
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1. The Fellow Awards Committee to evaluate AOAO Fellow Program
 - a. Define the purpose of the Fellowship program
 - b. Evaluate the feasibility of either enhancing or eliminating the program.
2. The Residency Liaison Committee and the Continuing Medical Education Planning Committee to work in partnership to develop a program for both residents and practicing orthopedists.
 - a. Members to develop a mentoring program that helps residents with specific business and practice tips, and pathways to leadership within the AOAO, including the opportunity to become a Fellow.

Strategic Priorities and Recommendations

Education Process	Advocacy	Outreach	Professional Development	Academy Resources
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- b. A program for practicing AOA members that provides opportunities for D.O. orthopedic surgeons to visit other D.O. orthopedic surgeons outside their normal training / practice area for the purposes of practical frontline training and strengthening resident mentoring.

Strategic Priorities and Recommendations

Education Process	Advocacy	Outreach	Professional Development	Academy Resources
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3. The Board of Directors will work to Evaluate the Quality of the Current Sections Offered by the Academy
 - a. Current AOA Section Regulations are as follows: The Board of Directors may authorize and dissolve Sections of the Academy as determined by the Board of Directors:
 - Shall submit to the Board of Directors bylaws which shall be consistent with the bylaws, policies, and procedures of the Academy
 - The administration of each Section shall in no way conflict with the overall objectives, ideals, and functions of the Academy

Strategic Priorities and Recommendations

Education Process	Advocacy	Outreach	Professional Development	Academy Resources
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1. The Rules, Regulations and By-Laws Committee will Evaluate the 2010-11 Committee Structure:
 - a. In light of the new strategic plan the Committee will make recommendations related to the purpose, number, nature, and potential consolidation and/or elimination of AOA committees.

Strategic Priorities and Recommendations

Education Process	Advocacy	Outreach	Professional Development	Academy Resources
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2. The Board of Directors to Evaluate the Current Staffing and Management Contract to Maximize Academy Resources
 - a. Work toward a “single office” transition to create a unified and seamless administrative infrastructure through an evaluation of keeping, expanding, or terminating the current professional management contract with Ruggles based on the AOA’s strategic priorities and long term vision.
 - b. Retain the director of the Florida office in a consulting role for no more than 1 year to provide historical administrative experience and connectively with members and to continue the publication of “ The Orthopod”
 - c. Develop a severance program for Florida based staff who may be terminated

Strategic Priorities and Recommendations

Education Process	Advocacy	Outreach	Professional Development	Academy Resources
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- d. Communicate the result of the streamlining process to members and other audiences.
- e. Develop a plan to continue, discontinue, or substantially change “The Orthopod” publication in 2012.

Next Steps...



Evaluation Process

Tripp Umbach will provide consultation during a six month evaluation process as outlined below:

- ❑ Actions within the five priority areas will be tracked by the Executive Director on a monthly basis by using an electronic tracking / evaluation system, to be developed by Tripp Umbach which will be uploaded via Dropbox.
- ❑ Tripp Umbach will interface with the Executive Director on a monthly basis to update the evaluation tracking system
- ❑ A strategic planning progress report will be developed by Tripp Umbach and presented to the Board of Directors at the Spring meeting in Scottsdale.

Appendices

- A. Core Working Group Pre-Planning Session*
- B. Key Interview Responses
- C. Work Session – Board Responses
 - ❑ Membership Benefits Survey Responses*
 - ❑ Evaluation of Core, Elective, and Potential Service*
- D. Dropbox – Creating Academy Connectivity
- E. *"At-a-Glance" Examples



* Included as a Word Document

Appendix A: Core Working Group Pre-Planning Session

- Included as a separate attachment -- Word Document

Appendix B: Key Interview Responses

- ❑ A vital component of the strategic planning process included asking members and affiliated key stakeholders about specific areas regarding their perception of AOA.
- ❑ The discussion guide responses provided the strategic planning working group with a broad basis and/or foundation for the facilitation of a comprehensive planning session held on October 23rd in San Francisco.

Key Interview Responses -- Strengths

Strengths:

- Members desire to do more and to be better and improve
- Residency
- Good CME programs with good leadership in place
- Evaluation committee is strong
- Post graduate is strong
- For the size of the Academy doing a fairly good job, trying to be progressive, looking to see what the members needs are which is different from the past

Strengths:

- Small group committed to education of its members – active participation by membership – loyal membership
- Management is not “top heavy” and is attuned to the needs and requests of membership – close knit with members
- Positive balance sheet – strong financially
- The BOD advocates residents
- Good website and newsletter
- Well organized. Good structure. Good residency involvement

Key Interview Responses -- Weaknesses

Weaknesses:

- Need to define the mission, if charter of organization is education then need to enhance the education
- Lacking new technology (simulated training for surgeons), must be modern
- Very small group doesn't give us clout (ex: political position), limits to what we can do (education/residency programs),
- Need to focus on main mission once defined, mission/vision is not clear, need a common goal
- Fragmentation – no unified mission

Weaknesses:

- Redundant services
- Logs entry on the website is difficult to use. Education is lacking. The magazine is not educational. Can't say – don't know enough about organization.
- We don't have the volume to offer all the stuff we would like to
- Need to take the AOA/AOAO relationship more seriously
- Not spending the \$ enough on things that would be beneficial to making the organization stronger and more visible

Key Interview Responses -- Opportunities

Opportunities:

- Teach young doctors how to run their business
- Network with companies
- Look for input to sign on to be a voice (help grab younger members action and get them involved), more connection with the residents, students need interested
- Use internet (Facebook, Twitter, etc.) to keep up to date with members, residents, and community -- need to maybe hire an IT expert or assign someone internally to take care of this aspect

Opportunities:

- Possibly separate the outreach efforts by age specific of members
- More resident involvement (provide a take back so it doesn't seem just a mandatory thing to be a part of)
- Community practices create a foundation to set up community setting for research
- Give residents opportunity to speak at meetings so then they can have points toward their fellowship

Appendix C: Work Session – Board Responses

- Included as a separate attachment -- Word Document

Appendix D: Dropbox

What is Dropbox?

- Dropbox is software that links all of your computers together via a single folder. It's the easiest way to back up and sync files between computers.
- The Dropbox Website allows you to access your files on any computer from a web browser. You can also use the Dropbox website to share your files or folders with others.
- The Dropbox mobile website and Dropbox for mobile devices allow you to connect to your Dropbox from your pocket, so you can take your files with you wherever you go.

Appendix D: Dropbox

Some things you can do via the Dropbox contextual menu:

- Share a folder** invites your friends to access a folder in your Dropbox. That folder and its contents will appear in their Dropbox folders as well as yours.
- View Previous Versions** allows you to view your file's change history and revert your file to an older version.
- Browse File on Dropbox Website...** to view the file on the Dropbox website.
- Copy Public Link** lets you share a file with your friends via a URL, or internet link.

Appendix E: “At-a-Glance” Examples

- Included as separate attachments