

[draft as of 11/5/2016]

SoWH Strategic Plan

2016 – 2019

Here is an outline of the SoWH strategic agenda and scope of work over the next three years.

Strategic Plan Goals:

- 1) Provide multi-level professional education that is excellent, relevant, and diverse.
- 2) Conduct effective branding that is supported by timely, clear marketing and communications.
- 3) Build community through professional and social networking, and create opportunities for the next generation of leaders.
- 4) Promote best practices through practice guidelines.
- 5) Develop and implement a rigorous research strategy.
- 6) Review our governance structure and practices to become a more strategic board.

The SoWH Board of Directors met July 22–24, 2016, to confirm current organization priorities and/or craft new ones consistent with more recent experience and learning. Those participating in the summer planning and priority-setting meeting included:

Board of Directors

Meryl Alappattu
Sarah Haag
Sandy Hilton
Chris Holladay
Jennifer Hungate
Lori Maze
UC Ossai
Carrie Pagliano
Amy Pannullo
Patricia Wolfe

Staff

Kristin Clarke, CAE
Aika Barzhaxynova

Timeline

Milestones

Goal

	Next Two Years	Next Three Years	Next Five Years
1 Provide multi-level professional education that is excellent, relevant, and diverse.	<ul style="list-style-type: none"> • Create education “bands” that align with the career path of PTs. • Begin development of new courses that align with member needs. • Select partners as appropriate. 	<ul style="list-style-type: none"> • Offer advanced professional education, in addition to basic and mid-level options. • Create education options in different formats (live, on-demand, hybrid) for the next generation of leaders. 	<ul style="list-style-type: none"> • Advanced education fills a void in the marketplace and further positions the association as the leader in content for pelvic and abdominal health PTs. • Continue to diversify the education revenue flows to boost profitability of on-demand learning modules, Collaborative Courses, & other options.
2 Conduct effective branding that is supported by timely, clear marketing and communications.	<ul style="list-style-type: none"> • Develop and implement the new brand, ensuring that financial resources are in place to adequately fund the process. • Develop strategies to improve internal and external communications to ensure clarity, cohesiveness and better understanding by all involved. 	<ul style="list-style-type: none"> • Assess brand impact on the members and marketplace. • Use data to drive decision-making around branding and strengthening the value proposition of SOWH. 	<ul style="list-style-type: none"> • Increase our brand's global presence and awareness—aim to become a community with resources, professional education, and tools to start and grow your practice.
3 Build community and engagement through professional and social networking.	<ul style="list-style-type: none"> • Expand our presence at events (CSM growth, chapters, etc). • Explore next-generation engagement trends & position our organization accordingly. • Enhance technology platforms/website. 	<ul style="list-style-type: none"> • Implement events with advanced content. • Measure acceptance and satisfaction. • Strengthen our competitive position by identifying & communicating what makes us special and superior to competitor offerings. 	<ul style="list-style-type: none"> • Build community by delivering value, collaborative technologies, and engagement options to members and society. • Expand our community globally with more education offered in person and online that appeals to PTs in other countries, cultures, and languages.
4 Promote best practices through Clinic Practice Guidelines.	<ul style="list-style-type: none"> • The Section identifies and begins work on several new Clinical 	<ul style="list-style-type: none"> • Any final CPGs are published in the Journal and publicized 	<ul style="list-style-type: none"> • The Section becomes known as an incubator and trailblazer in the

	<p>Practice Guidelines.</p> <ul style="list-style-type: none"> The number of SOWH members involved in developing CPGs rises. 	<p>heavily to the PT community to ensure adoption and awareness.</p> <ul style="list-style-type: none"> A steady assortment of CPG projects receive funding. 	<p>arena of CPG development. It regularly receives APTA grant funding for CPG initiatives, and members are actively engaged in CPG creation.</p>
<p>5 Develop and implement a rigorous research strategy.</p>	<ul style="list-style-type: none"> Develop and launch a strategic research plan that clarifies the role of research in the Section and the role of the Section in the profession's research development/growth. A robust Research Committee drives the strategy direction. Re-imagine and re-launch the journal. 	<ul style="list-style-type: none"> Members are provided with relevant, timely research in a variety of formats, so research becomes integral to the value proposition of Section membership and engagement. Research feeds the content for the <i>Journal</i> and event content. The <i>Journal</i> becomes a must-read publication. Surveys show higher satisfaction. 	<ul style="list-style-type: none"> Launch major research initiatives (fund or partner with others to achieve). The <i>Journal</i> becomes a truly globally respected publication, operating with positive key performance indicators such as a steady manuscript flow and a large cadre of international authors.
<p>6 Review our governance structure to become a more strategic board.</p>	<ul style="list-style-type: none"> Adopt new bylaws. Initiate a self-assessment process. Create a Governance Committee. 	<ul style="list-style-type: none"> Restructure and redefine the board and committees to support the strategic plan. 	<ul style="list-style-type: none"> Redo the strategic plan.

In the section below, you will now see each of the six strategic plan goals with the next level of detail for each item: objectives, activities, and actions; who is responsible for oversight; a target date for completion or meeting of major milestone(s); and the budget that aligns with each objective.

In this next section, we recommend you use these guiding principles:

- Keep the language strategic and simple to understand and easy to explain to others. If it doesn't make sense to you, it probably won't make sense to others. In these cases, the board should discuss the items and clearly articulate the true intent of each item. This approach will make the process easier for everyone involved.
- Avoid using the word "and" in the description. If you are tempted to add **and**, that should be your cue to make an item into a separate item so it gets the attention it deserves.
- Avoid using the term "ongoing." Instead, determine a major milestone to work toward; that becomes the measurement.
- While this is intended to be a flexible and evolving document over time, we don't recommend you change the contents too often. We recommend a quarterly review by board members to make minor updates and refinements (add, change, delete as needed to reflect the marketplace), with a complete and thorough review once a year. This yearly review should happen in the summer so any changes can be correctly reflected in the next year's budget. By taking this approach, the strategy and budget are in constant alignment, making both staff and volunteer workflow much easier on all involved.

Finally, during the 2016 strategic planning retreat, board members worked in teams on eight business plans that support the strategic plan. The concept was simple: by having board members think through key strategic initiatives while together in person, they would accomplish more throughout the year because much of the necessary face-to-face collaboration and debate would have taken place at the retreat and was then channeled into the business plans. We strongly recommend that the current board and incoming board members review the business plans before attempting to make refinements to this document. The plans are designed to be easy to change and serve as working documents for the topic areas.

Recap:

- The values, vision, and mission should only change when formal strategic planning is conducted every 3–5 years (and often won't change for many years).
- The scorecard is used to start board meetings by focusing on big-picture strategic goals and measurements.
- The timeline enables board members to envision workflow into the future.
- The strategic objectives are used at board meetings to give at-a-glance views of the work being done in each strategic objective area.
- The eight work plans are used at board meetings to further build out the actions and tactics. Many times these plans are assigned to committees and taskforces to get work done in between board meetings. Once an item is completed, the work plan can be archived.

Please refer to the retreat PowerPoint for definitions and to answer any additional questions regarding how this work was framed. All of the sections of this document are intended to serve different but complementary components of the strategic plan.

CONTINUE TO NEXT PAGE →

Strategic Objectives

(to support each of the six goals)

Goal 1: Provide multi-level professional education that is excellent, relevant, and diverse.

Strategic Objective #	Strategic Objective	Activities and Actions	Responsibility	When	Budget
	Increase the number of advanced clinical courses for members to create differentiation in the marketplace.	Create advanced content or partner with providers to develop a top tier of advanced offerings. Contract a 10-hr/wk PT to manage growing workload around course growth. Draft and sign contracts. Determine location, instructors, and dates.	Education Committee to identify course authors. AMG to handle contracting. 2016	2017-2019	
	Update education manuals, patient materials, and on-demand learning modules to reflect current trends and ensure they are supported by evidence-based research.	Identify and develop content. Reduce time-consuming, less-engaging manual work such as copyright permissions & citation editing. Create Patient Materials Task Force to draft new patient materials. Sunset outdated on-demand learning modules and add new ones, either through partnerships or co-creation.	BOD, CAPP Committee, instructors, AMG	2017-2019	
	Find the appropriate balance between courses that are profitable and affordable for members. Re-examine pricing across product lines.	Verify and monitor minimum instructor/participant ratios. Develop brand and marketing strategy to support course offerings. Determine marketing responsibilities (tactics) between board and staff. Research pricing by competitors for various types of education. Ensure our pricing is competitive and our value proposition is clear.	CAPP Committee, Director of Education, Director of Programming, AMG	2017 2017 2016-2017 2017	
	Use the new branding to market-relevant messages regarding advanced offerings to receptive segments of the PT community. Find ways to generate data to assist with this.	Work with Communications Committee and staff to create messages that convey the new advanced offerings. Monitor the success of efforts by tracking participation and satisfaction in programs for attendees and instructors. Investment in new technologies with more advanced analytical capabilities may be needed.	Brand task force, AMG, Director of Education, Director of Programming	2017 2016-2019 2017	

Goal 2: Conduct effective branding that is supported by timely, clear marketing and communications.

Strategic Objective #	Strategic Objective	Activities and Actions	Responsibility	When	Budget
	Enhance technologies to allow for greater interaction with the community.	Define community and member engagement goals and measurements.	AMG staff and Brand/Communications Committee	2017	
		Enhance the platform to match and exceed members' needs (examples: clinical questions listserv, Knowledge Center website kept current and relevant).		2017	
	Fully implement the new branding strategy.	Create a brand implementation timeline with milestones.	AMG staff and Brand/Communications Committee; branding consultants engaged as needed	2017-2018	
		Communicate with members about why the rebranding and new mission/vision were needed.		2016-2017	
		Develop brand style guidelines.		2017	
		Establish success measurements and monitor progress.		2017-2019	
	Frame advanced architecture ("next iteration of the website") to reflect the new branding and assure ease of member access and use.	Work with the web design company/CMS software provider to determine needed enhancements. Test with members.	AMG, Director of Communications, Membership Committee (focus group, beta testers)	2016-2017	
		Fix PT Locator, the top attraction on SOWH's site.		2016	

Goal 3: Build community and engagement through professional and social networking.

Strategic Objective #	Strategic Objective	Activities and Actions	Responsibility	When	Budget
	Provide multiple and affordable opportunities each year for members to meet face-to-face.	Create a strategic event strategy that aligns all events with member populations and needs.	Membership Committee, AMG (Executive Director and meeting planning support), Director of Communications, Student SSIG, Director of Programming	2016-2017	
		Look at chapters, other sections, & APTA for options, as well as outside organizations.		2017	
	Engage student members and ultimately convert them to long-term paying members. Create opportunities for the next generation of leaders.	Develop brand messages that appeal to students.	AMG (Executive Director), Membership Committee, and SSIG	2017	
		Align student liaisons with appropriate directors.		2017-2018	
		Hold student "onboarding session" at events.		2017	
		At events, hold student insight sessions/focus groups/brown-bag meetings to solicit feedback from students on their changing needs and on how the association can better serve them in the future.		2017-2019	
		Inform young professionals how they can chart a path to achieve leadership positions within the association over the long term.		2017-2018	
		Create a subcommittee in the Membership Committee to study and advise ways to improve conversion rates (year-one members), especially those transitioning into the profession.		2017	
	Expand the use of new technologies to enhance the member experience and grow the brand. Use social media presence and followers (Twitter, LinkedIn, Facebook) to launch the new brand with "a new story to tell" to current and prospective members.	Consider collaborative online community platforms.	AMG, Director of Communications	2016-2017	
		Create collaborative blog posts on different topics with relevant content and timely postings.		2016-2019	
		Research and potentially invest in the use of videos to boost engagement & understanding of the Section's mission and activities.		2016-2017	
		Focus on proactive communications with an e-blast schedule and policy (develop an expanded calendar for SOWH communications).		2016-2017	
				2017	
	Expand international networking and professional development.	Promote Partners Program to expand appropriate offerings globally.	International Education Committee, AMG, Director of Communications	2017-2019	
		Develop strategies for creating branding and			

marketing messages that resonate in other countries (cultural acceptance/language, etc.).

Expand representation at future international courses/conferences through the new Ambassadors Program.

2018-2019

2016-2019

Goal 4: Promote best practices through Clinical Practice Guidelines.

Strategic Objective #	Strategic Objective	Activities and Actions	Responsibility	When	Budget
	Develop current and relevant Clinical Practice Guidelines with clearly articulated timelines.	Define scope and composition of the committee.	Director of Practice, <i>Journal</i> editor, Director of Research, BOD, APTA, appropriate sections	2017 2016-2019	
	Continue strategic collaboration with APTA and the SOWH board.	Regular updates (at board meetings and as needed) regarding strategic plan actions and scorecard progress.	President, AMG, Director of Communications		
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Goal 5: Implement a rigorous research strategy.

Strategic Objective #	Strategic Objective	Activities and Actions	Responsibility	When	Budget
	Re-imagine and re-launch the Journal.	<p>Establish an appropriate job description for a new editor.</p> <p>Hire a new editor.</p> <p>The new editor co-leads a task force with Director of Research to create a strategic plan to re-imagine and re-launch the <i>Journal</i>.</p> <p>This includes</p> <ul style="list-style-type: none"> • Publishing evidence-based articles. • Ensuring the <i>Journal</i> is listed with Pub Med and other online databases. • Explore and implement international affiliates for <i>Journal</i>. 	President, AMG, Director of Communications, Board of Directors input required	<p>2016</p> <p>2016</p> <p>2016-2017</p> <p>2016-2019</p>	
	Install a rigorous research process that ultimately feeds the content for the <i>Journal</i> and professional education program course content.	<p>Assess member and marketplace needs by gathering data on professional practices and members.</p> <p>Create the research agenda and prioritize activities.</p> <p>Create and implement a strategic research plan that aligns with the annual budget process and association events.</p> <p>Determine if the research should be done by the association or by other sources (outside providers, academic institutions, other associations, etc.).</p>	The new <i>Journal</i> editor, Director of Research, Research Committee and Chair, AMG staff	<p>2016-2019</p> <p>2017</p> <p>2018</p> <p>2018</p>	
	Engage therapists who aspire to do research but do not have the training and understanding to engage.	<p>Create a process that maps the pathway to doing research and articulates the following:</p> <ul style="list-style-type: none"> • The future research agenda and priorities • Ways to get involved and qualifications • The steps (how and with whom) to start the engagement process 	Membership Committee, Director of Research, Research Committee and Chair	2018	
	Assess current PT Foundation donations and explore new ways to partner with and leverage the Foundation to a greater level over the next 5-7 years.	<p>Assess Section members' satisfaction with our partnership with the PT Foundation.</p> <p>Identify new prospects and their goals and</p>	AMG, Director of Research, and Treasurer	2017	

<p>Explore grant funding for new research activities.</p>	<p>success measurement. Create a prioritized list of research projects that need funding.</p>		
<p>Explore and implement CEU credits for high-value activities such as journal reviews and CAPP research.</p>	<p>Work with APTA and State Boards of PT to determine CEU updated accreditation standards, process, and best practices. Research price of certifications to make sure they are competitive in the marketplace.</p>	<p>AMG staff, APTA contacts, Membership Committee, Director of Research, Director of Education, Research Committee and Chair</p>	<p>2017-2018</p>

Goal 6: Review our governance structure to become a more strategic board.

Strategic Objective #	Strategic Objective	Activities and Actions	Responsibility	When	Budget
	Review our governance structure to become a more strategic board. Re-draft the bylaws.		President, board, AMG		
	Create a Governance Committee to examine strengths and weaknesses of the board structure, leadership pipeline, etc.	Create a Governance Committee.		2016-2017	
	Commit to annual self-assessments, both as a board and as board members. Identify and work on areas of weakness; celebrate and leverage strengths.	Integrate governance training into all meetings.	Board, AMG	At each board meeting and retreat minimum.	
	Commit to learning more about the practice of good governance. Reserve time at board meetings to learn more about nonprofit leadership.	Create a decision-making flowchart to clarify how decisions will be made.	Governance Committee	2017	
	Explore alternative board and committee structures.	Research board and committee models.	Governance Committee or Governance Restructure Task Force, Executive Director	2017-mid-2018	
		Engage members in the governance re-envisioning process.	Governance Committee, AMG	2017-2018	
		Hire a governance consultant.	President, board, AMG	2018	
	Initiate a self-assessment process.	Establish an annual schedule of self-assessment.	Board	2017	
	Adopt new bylaws.	Rewrite and obtain approval for new bylaws.	President, treasurer, executive director, board, APTA	2016-2018	
	Evaluate AMG and executive director annually.	In partnership with the executive director, establish clear, attainable goals, measurements and expectations for AMG and the executive director that sync with the contracted scope of work.	Board	2017	

SOWH Strategic Plan Scorecard

<u>Category</u>	<u>Measure</u>
Create and implement a rigorous research strategy.	<input type="checkbox"/> Re-imagine and re-launch the Journal <input type="checkbox"/> Research published and used in practice <input type="checkbox"/> Strong internal key performance indicators (manuscript flow; higher-quality, evidence-based articles)
Promote best practices through practice guidelines.	<input type="checkbox"/> Funding, creation & publication of Clinical Practice Guidelines that position SOWH as a leader in the evolution of the profession.
Build community and engagement by delivering value to members and society.	<input type="checkbox"/> Member retention rates, satisfaction ratings, and engagement levels <input type="checkbox"/> Member value proposition strengthened <input type="checkbox"/> Growth in millennial membership growth, conversion rates, satisfaction, & engagement.
Offer basic, mid-level, and advanced professional education.	<input type="checkbox"/> Number and diversity of advanced courses offered <input type="checkbox"/> Education data trending upward (attendance, finances, instructor ratings, certifications)
Implement branding.	<input type="checkbox"/> Brand awareness increased; image enhanced (member satisfaction scores). <input type="checkbox"/> Key messaging of vision and mission developed & consistently distributed.
Organizational relationships are healthy, collaborative, and growing.	<input type="checkbox"/> Clear understanding and evaluation by board and AMG staff of roles, responsibilities, & priorities, which creates a culture of positive partnership. <input type="checkbox"/> External engagement with organizations increases (presentations, tradeshow attendance, visits, shared resources)
Renew our governance structure and practices to become a more strategic board.	<input type="checkbox"/> Governance Committee formed and guiding the board to higher-level critical-making, decisions, and structure. <input type="checkbox"/> Self-assessment scores and consistent improvement.

Scorecard

The scorecard is intended to be used as a strategic tool that should be reviewed at the start of each board meeting to focus the conversations on the big-picture, strategic intentions of the organization before moving into tactical conversations.

The scorecard reminds the board of the overarching work-plan goals, so conversations have long-term continuity, resulting in the big strategic initiatives getting the majority of the attention. These categories and measurements are intended to reflect the values, vision, and mission of the organization.

Ultimately, the scorecard is used by the board to focus on the right strategic initiatives and improve accountability over time, so high-priority strategic work gets done first, ahead of other tasks.

The scorecard is intentionally broad and strategic, because it is a long-term tool—not for short-term tactical activities.

Goals Placed on a Timeline

The next section of this document takes the strategic plan goals and places them on a timeline with a two- to five-year horizon.

These strategic plan goals are shown on the left side of the table below:

- 1) Provide multi-level professional education that is excellent, relevant, and diverse.
- 2) Conduct effective branding that is supported by timely, clear marketing and communications.
- 3) Build community and engagement through professional and social networking (create opportunities for the next generation of leaders).
- 4) Promote best practices through practice guidelines, both within our specialty physical therapy practice and the organization operationally.
- 5) Develop and Implement a rigorous research strategy.
- 6) Review our governance structure to become a more strategic board. [I'm not sure why it won't let me do a "6" here but I'll fix it later.

As you would expect, major strategic goals will require different milestones in the timeline based on their priority and complexity. You will see the key activities for the next two years, and then through the third year, and finally continuing into the next five years (2021).

At the five-year point, you should update the strategic plan again; sooner if there are major shifts in the marketplace affecting the membership and the association overall, and these shifts require updated strategic goals.