

2012-2015

APTR Strategic Plan

Promoting Health through Prevention Education and Research



ASSOCIATION FOR PREVENTION TEACHING AND RESEARCH

APTR STRATEGIC PLANNING METHODOLOGY

Methodology and Key Process Elements

The methodology used to facilitate the strategic planning process involved research and facilitation components consisting of:

- 30+ in-depth interviews with APTR leaders, members, and affiliates, 5 focus groups of key constituents,
- Staff interviews,
- A quantitative survey sent to all members,
- An environmental scan testing 17 different environments sent to key APTR leaders and partner organizations,
- An alternative futures case study to visit what might happen to the association in a variety of circumstances, and from which to take lessons learned and apply them to the current environment.
- 14 hours of facilitation time conducted with the Planning Team over a two day meeting for a strategic planning orientation, to review and catalog the research findings and develop this draft strategic plan based on member needs and desires, complete with Core Purpose statements, a Vision, a Goal oriented Mission statement and prioritized Objectives from which to base the future work plan of the association.
- The planning team also spent additional time creating Tactical Initiative areas to link the strategic plan with the operational plan. A separate additional meeting in February will address and flesh out TI's, which the staff and Board can address.

Future Strategic Work

The future plan development journey should follow this sequence:

Future activities for approval of the plan and to tie the plan to Operations and time frame.

- Review the draft of this plan and approve it— The Planning Team –January
- Appoint members of the Planning Team to create TI's for each Priority Objective—January / February
- Draft Tactical Initiatives for Prioritized Objectives with suggested metrics for evaluation— The Planning Team—February
- Conduct a facilitation to draft TI's—Planning Team—February 17—Washington D.C.
- Review TI's and conduct Internal Program Assessment to Ensure Current Programs are aligned with the new plan and Initiatives—Staff /Consultants—February
- Develop the 2012 Business Plan and Budget based on the new plan—Staff / Operating Committees—February/March
- Review Plan Progress and Tune-Up Quarterly—Board/Staff

Key Research Environments

The following scan areas were examined and elements were prioritized under each along with results from the qualitative and quantitative research resulting with a list of key issues (next page) used in framing goal areas and priority objectives (see research reports)

- Scope
- Internal Issues
- External Issues
- Demographic and Geographic Environments
- Economic and Financial Environments
- Technological and social media Environment
- Federal Grants and Education of Regulators
- Strengths of APTR
- Weaknesses of APTR
- Threats
- Opportunities
- Assumptions
- Issues Surrounding Education, Meeting Content and the Journal
- Membership, Marketing, Communications and Branding
- Governance and Management Issues
- Training Programs and Scholarship

Findings from the Research in Priority Order

1. **Scope and Mission:** preventionists—focus on prevention-individuals-organizations—don't know exactly what our mission is—clarify our mission and relationships with other organizations—are we a membership or a mission related organization— Prevention/teaching and research-need to keep in the front—need to reach out proactively to appropriate constituencies for members—focus on prevention and public health issues—inter-professional relationships critical.
2. **Communication:** positive but not enough—content needed and value equation needs to be defined better by segment—person to person needs to be used to recruit—segments need different messages—need to use social media to integrate with our overall communications channels—website is not used by all the members—need to make it more of a benefit and integrate with all aspects of APTR—federal agency communications are critical and need to be a priority—social media most important for communicating with segments, especially younger segments.
3. **Funding:** major issue to determine resources in the future—need a backup plan.
4. **Membership:** Relook at membership and categories—possible new segments to expand reach—look for new opportunities in other professions—quantification of the value equation—need to cultivate younger members —need to involve members on a more regular basis.
5. **Governance structure:** review to be representative, with the right proactive committee and TF structure—proactive and prepare for the future—lack of leadership entry now—leadership can help provide for academic promotion—leadership training--need to identify leaders--need to look at succession planning—review benchmarks and best practice model structures and bylaws.
6. **Marketing:** need to segment membership and prospects with the messages that we want to put forward emphasizing the value proposition.

7. **Services and products:** focus on prevention—mismatch between what we do and what members want--not segmenting enough--too much reliance on individual (small pool of) volunteers here—differences in satisfaction and importance of most products is great—distance learning coming on board.
8. **Competition:** overlap with many groups that compete for funding and members—will get worse--we are always secondary buys—need to know who we are to define competitors accurately—competition increase with less funding available.
9. **Networking:** small organization –not as good as we think, need to emphasize networking more
10. **Education:** members want more content in person and on the web (repository) –need more of an educational orientation
11. **Public and Media:** need more emphasis—need to improve and get the word out
12. **Advocacy:** What are we advocating for?—serve as a link to members—need to be more active in advocacy and bring back what policy makers want as well- need to understand federal laws and agencies’ agendas better and anticipate needs
13. **Journal:** make more relevant to the membership—dual distribution issues
14. **PERC**—need to bolster content as a value builder—be a central repository—make more visible—resource issue
15. **Newsletter**—needs to connect to public health and to our members--relevancy is key
16. **Staffing** –influenced by funding and need to know if they are focused on the right priorities
17. **Training**–need to continue—at what cost?

ALTERNATIVE FUTURES CASE STUDY

Takeaways and Lessons Learned for Incorporation into our Current Plan¹

- Need for innovation—home for “prevention innovation”
- No one does what we do—our niche is different and unique
- Look at the nontraditional (funding and programming)
- Need to focus and define ourselves
- Diversify funding sources
- Involve other members of faculties and not just the primary member—Focus on faculties in both medical and programs of PH
- need to segment our members and deliver the value equation to each
- Peer communication (annual and other meetings) is important
- Need to develop metric and define what segment of the academic P and PH can serve as our metric for strategy development.
- Distinguishing between partner and competitor activities

¹ Each group presented their perspectives on the scenarios and the following emerged as important to the current planning process.

PRIORITY CORE VALUES

Identified core values fundamental to the core purpose of APTR

Fundamental core values for APTR developed by the Task Force, under which to construct the plan:

- Creativity and Innovation
- Action Oriented
- Visionary Leadership
- Focus on the Future
- Initiative and Sense of Urgency
- Valuing People and Partner
- Being the Best—the distinguishing resource for prevention/population education

Guiding Core Purpose Statements

The planning team developed the following core purpose statements to guide its creation of the vision of the organization.

- Prevention and population health
- Sharing /collaboration/empowering /advancing /supporting members
- Helping members innovate
- Research Base
- Inter-professional teaching
- Enhancing and developing prevention education for doctors, graduates of public health and other professions
- “Leaders of innovation”
- We are at the intersection of PH & HP
- Provide technical support to educators, org partners and communities
- APTR is the core resource for teaching prevention and population health in health care delivery across professions and other organizations
- “Leading in innovation in population health education and practices”

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APTR VISION AND MISSION

Vision

Population health and prevention are integral parts of every health professional's education.

Mission

APTR leads innovation in population health and prevention education.

GOAL AREAS

- A. EDUCATION
- B. ADVOCACY AND POLICY
- C. MARKETING, COMMUNICATIONS AND PUBLIC RELATIONS
- D. MEMBERSHIP
- E. GOVERNANCE AND MANAGEMENT
- F. RESEARCH AND SCHOLARSHIP

GOAL AND OBJECTIVES

Objectives are listed in priority

GOAL AREA A. PUBLIC HEALTH AND PREVENTION EDUCATION

OBJECTIVE A1: Embed public health and prevention education into the emerging health system by ensuring the recognition of the value of public health and prevention education for future practitioners and administrators.

- A1.1. APTR will collaborate and form strong partnerships with a wide range of organizations and with them, will play a lead role in strengthening prevention and population health.
- A1.2. Continue dissemination of CPPH Framework and data collection efforts for HP2020
- A1.3. Publicize role in HP2020 data collection efforts and development of objectives

OBJECTIVE A2: Promote interprofessional collaboration in prevention and public health education

- A2.1. Establish Interprofessional Prevention Education as a companion to Interprofessional Education.
- A2.2. Clearly articulate how Interprofessional Prevention Education advances the goals of Healthy People 2020.
- A2.3. Promote APTR educational and resource materials in Interprofessional Prevention Education through conferences, trainings and publications.

A2.4. Form an official interprofessional curriculum task force comprised of the APTR membership.

OBJECTIVE A3: Provide multiple opportunities to convene in order to share educational opportunities and experiences

- A3.1. Create networking opportunities for members and prospective members that includes regional and virtual meeting spaces, in addition to an annual, national meeting in order to create a broader set of opportunities for members to meet and exchange ideas
- A3.2. Expand current and create new networking and peer communications opportunities at the annual meeting and other venues

OBJECTIVE A4: Expand capacity of health professions educators to teach prevention and public health

- A4.1. Enhance skills of membership in teaching prevention and public health and provide them with resources or tools to enhance their effectiveness
- A4.2. Solicit publication of 'tools' for teaching prevention and public health – both for PERC and AJPM
- A4.3. Provide workshops for novel educational modalities at national meetings
- A4.4. Create Council of Preventive Medicine Educators
- A4.5. Facilitate the meeting of combined MD/MPH programs, preventive medicine and other residency programs and preventive medicine curriculum directors.
- A4.6. Develop, assess and bank innovative educational tools. (e.g. PERC)

OBJECTIVE A5: Support members in pursuing meaningful accreditation or credentialing

- A5.1. Facilitate efforts by members to be recognized by boards (or maintain such designations) that confer certification of individuals or accreditation of organizations/programs as exemplary academic or clinical performances.
- A5.2. Represent graduate public health programs to the Council on Education for Public Health and the National Board of Public Health Examiners.
- A5.3. Disseminate and warehouse information about preparing and register for certification and/or accreditation
- A5.4. Offer CE opportunities that support certification and/or accreditation such as AJPM articles for CPH credit and provide MOC for preventive medicine physicians.

GOAL AREA B. ADVOCACY

OBJECTIVE B1: Educate and inform members on policy issues

- B1.1. Create an advocacy agenda for APTR through the development of a policy committee

OBJECTIVE B2: Take policy and or position statements on issues appropriate to field

- B2.1. Create and approve a policy development and approval process that allows for both rapid response to unfolding events and longer term development of policy statements.

OBJECTIVE B3: Maximize relationships with partner ORGANIZATIONS AND funding entities

- B3.1. Explore ways to enhance support, both financial and philosophical, from federal agencies, foundations, and like-minded public health associations for prevention and public health training, education, and research activities.
- B3.2. Initiate discussions with ASTHO and NACCHO on the development of alliances for joint efforts on public health workforce issues
- B3.3. Plan targeted visits with key personnel at CDC, ODPHP, HRSA, and AHRQ to investigate alternatives for APTR participation and support in achieving agency goals.
- B3.4. Capitalize on the Council of Graduate Program survey results to promote APTR as the come-to organization for connecting with and influencing future development of public health education and training in MPH programs
- B3.5. Look to expand relationships with HPCTF member orgs.

GOAL AREA C. MARKETING, COMMUNICATIONS AND PUBLIC RELATIONS

OBJECTIVE C1: Increase APTR visibility for programs and services among all internal and external constituencies using clear and multiple communications channels

- C1.1. Establish a comprehensive communication/marketing plan for all APTR products and services
- C1.2. Develop video messages (low cost and low tech) to communicate – message from the president, latest tool or meeting, etc. to put on website
- C1.3. Investigate the use social networking as part of the future communications plan

OBJECTIVE C2: Convey our unique value to other professional organizations, federal agencies, institutions and individuals

- C2.1. Engage interdisciplinary institutions and programs that are without distinct professional homes.
- C2.2. Submit oral and poster presentations on APTR initiatives for presentation at relevant national meetings.
- C2.3. Prepare a value equation slide show Board and other leaders can give wherever they are or at affiliated conferences, etc.

GOAL AREA D. MEMBERSHIP

OBJECTIVE D1: Define solicit APTR's universe of potential members and segment appropriately

- D1.1. Clearly define priority target groups for membership and develop recruitment strategies that are defined for those specific groups and create collateral unique to their profession that spells out APTR's importance
- D1.2. Create mechanism to identify membership expertise

OBJECTIVE D2: Increase the number of graduate program members in APTR and the Council of Graduate Programs in Public Health

- D2.1. APTR will interact with every CEPH-accredited and accreditation eligible program to enroll and recruit their institutional membership in APTR.
- D2.2. Expand Council meeting at APHA convention.
- D2.3. Evaluate recruitment efforts at year-end with calls and or surveys to target Programs who chose not to join.
- D2.4. Enrich and expand web presence for the Council, and make publichealthprograms.org a more visible site.
- D2.5. Develop strategic plan for dealing with AAPHP to minimize the appearance of two voices for graduate programs

OBJECTIVE D3: Increase number of Individual members who are Public Health or Medical School faculty

- D3.1. Design and implement strategies and activities that clearly denote and justify the value of APTR membership and that will improve acquisition and retention of individual members.
- D3.2. Appoint a Board taskforce charged with defining the value/benefit of individual membership unique for faculty and a supportive, persuasive rationale for becoming a member or retaining a current membership
- D3.3. Formulate a plan for value-added product development that will enhance the perceived benefit of individual membership
- D3.4. Increase webinars and other faculty-oriented content to create members-only materials.

OBJECTIVE D4: Increase institutional membership of appropriate medical school departments

- D4.1. Design and implement strategies and activities that clearly denote and justify the value of APTR membership and that will improve acquisition and retention of institutional members
- D4.2. Form a Council for faculty from preventive medicine and define criteria for other like-minded departments.

OBJECTIVE D5: Increase APTR visibility among partners and others

- D5.1. Develop plan for strategic communication timeline with all members, including social media; Initiate regular strategic communication with members.
- D5.2. Inventory similar or overlapping goals, programs or activities with partner organizations and develop strategic plan for communicating APTR activities of interest to those partners.
- D5.3. Solidify relationship with member organizations of the Healthy People Curriculum Task Force.

GOAL AREA E. GOVERNANCE AND MANAGEMENT

OBJECTIVE E1: Create member involvement opportunities in the governance structure

OBJECTIVE E2: Review benchmarks and best practices, review and amend the bylaws and governance structure for nimble operations going forward

OBJECTIVE E3: Enhance board engagement through association management governance training to ensure succession planning and sustainable leadership

- E3.1. Ensure board members have tools and knowledge of APTR history and programs so they can contribute in a strategic manner and are trained in association governance management and duties and responsibilities of directors in a nonprofit organization.
- E3.2. Distribute board orientation materials when on-boarding new members
- E3.3. Initiate in-person orientation for new members with executive committee and key staff and initiate Board evaluations

OBJECTIVE E4: Create a detailed business plan using metrics and accountability standards

- E4.1. Create a multi-year business plan to include plans to achieve budget balance and long term viability that is tied to all APTR initiatives contained in this document and existing activities.

OBJECTIVE E5: Objective 2: Reevaluate funding sources and increase non-dues and non-federal revenue

- E5.1. Determine what sources of funding, other than dues and federal support, are potentially available to support APTR efforts.
- E5.2. Constitute a development function and pursue funding avenues;
- E5.3. Establish a task force from the Board and membership to develop project concepts to use in soliciting funds from foundations.
- E5.4. Identify appropriate funding sources.
- E5.5. Market potential projects to foundations with aligning interests

GOAL AREA F. RESEARCH AND SCHOLARSHIP

OBJECTIVE F1: Enhance scholarship of the membership by promoting opportunities for publication and presentation of work in prevention and public health

- F1.1. Assist members to publish and present work on prevention and public health
- F1.2. Encourage submission of materials to PERC
- F1.3. Explore expanding the scope of AJPM to publish evidence-based education & advocacy efforts.
- F1.4. provide funding information to members around prevention and public health education

OBJECTIVE F2: Provide opportunities to members for promotion to tenure

- F2.1. Provide opportunities within APTR for national leadership and 'publication' of scholarly works in order to enhance credentials for promotion and tenure.

Created by APTR Strategic Planning Team

Facilitated By:

Stephen C. Carey, Ph.D., CAE, Lead Strategist
Karen C. Clayton, CAE
Association Management + Marketing Resources
1.301.530.9066 www.ammr.com
scarey@ammr.com

About Association Management + Marketing Resources

AMMR specializes in conducting detailed association governance and membership studies using qualitative in-depth interviews, focus groups, environmental scans and quantitative needs assessment research in the key areas of:

- Governance, bylaws and management assessments, interventions and analysis
- Governance and staff management, strategic and operational planning
- Membership marketing and development
- Marketing & Communications research and planning
- Member needs assessments and qualitative research
- Volunteer and staff training in governance, marketing and communications
- Board and staff retreats and executive search