TOMA STRATEGIC PLAN

Steven L. Gates, D.O.
VISION

The Texas Osteopathic Medical Association will be the premiere advocate for all Texas osteopathic physicians and will promote our philosophy so that osteopathic medicine and principles will be at the forefront of efforts to provide quality healthcare.
MISSION

The Texas Osteopathic Medical Association’s Mission is to advocate and advance the distinct philosophy and principles of Osteopathic Medicine by promoting healthcare excellence in Texas, while loyally embracing and meeting the unique needs of the Osteopathic Family.
TOMA Strategic Plan and Business Plan

- **GOALS**
  - Apply and advance scientific knowledge to promote and enhance health, safety, and performance of those involved in Osteopathic medicine and related activities
1. Provide effective governance of the Association to maintain a sound financial structure to ensure organizational continuity
   1.1 Develop, implement and maintain financial policies and procedures guidelines conforming with best business practices for non-profit organizations
2. Ensure the health and growth of the Association through effective governance and leadership

- 2.1 Integrate representatives from all districts into the Association’s committees to promote opportunities for leadership development and interdisciplinary networking
- 2.2 Define specific roles and responsibilities for the Association’s elected officials and identify guidelines for their activities
2. Continued

- 2.3 Demonstrate sustained growth in the Association’s membership
- 2.4 Upgrade the Association’s website to optimize communications with membership and the public, and improve the quality of online services
- 2.5 Implement the Association’s Strategic and Business (Implementation) Plans and monitor progress
3. Provide educational opportunities to the membership and support the Association’s role in the promotion of Osteopathic Medicine and patient care in Texas
   - 3.1 Optimize the quality and relevance of the Association’s educational programs and activities
   - 3.2 Provide life-long learning opportunities and support for the Association’s core membership
3. Continued

3.3 Expand the Association’s role in the promotion of Osteopathic medicine and patient care in Texas.

3.4 Identify current Osteopathic medicine capabilities and programs worldwide and the existing gaps in basic and applied knowledge
4. Provide opportunities for member’s professional growth and development and involvement in the operation and leadership of the Association
  - 4.1 Establish a formal Mentorship Program
  - 4.2 Promote public recognition of members’ accomplishments through the Association’s awards program
4. Continued

4.3 Promote participation of the membership in the Association’s committees

4.4 Foster collaboration and joint efforts (co-sponsored professional meetings, technical exchanges, and training opportunities) in support of Osteopathic Medicine
TOMA Strategic Plan and Business Plan

5. Represent the discipline of Osteopathic Medicine before professional, commercial, and governmental organizations
   5.1 Identify emerging issues in Osteopathic medicine (including allied disciplines) and improve the Association’s responsiveness to these issues. Foster interdisciplinary approaches to manage Osteopathic medicine issues.
5. Continued

- 5.2 Advocate a human-centered approach to support the development and implementation of new and evolving technologies
- 5.3 Advocate Osteopathic medicine resolution, policies, and positions
5. Continued

5.4 Optimize the use of all available communications methods to support the information needs of the membership and increase public awareness/education about Osteopathic medicine (including allied disciplines)

5.5 Increase the Association’s international outreach and relevance by promoting TOMA Organization status among Medicine Societies around the world.
Three Winning Strategies to Convert Organizational Intentions Into Action

Published on September 8, 2011 by Jeff Hurt in Associations

“Good intentions don’t move mountains, Bulldozers do.”
For many organizations, the mission and the plan, if that’s all there is, are nothing more than good intentions.

Many leaders spend great time and resources helping their teams plan for the future. Afterwards, everyone in virtuous
Unfortunately, it’s nothing more than an intellectual exercise.

Once the mission and plan are finalized, they are fastened in a three ring binder that’s strategically placed on a shelf for all to see. Usually, that’s where they stay to collect dust.
Converting Intentions Into Strategies

- Until an organization’s team converts those plans into actual work, they’ve done nothing.
- Intentions are something you hope for. They are not the target without the work.
- Strategies are something you work for. They convert intention into action. Busyness into work.
Converting Intentions Into Strategies

- Strategies lead you to work for results. They are action-focused.
- Strategies are the bulldozers that move mountains. They convert what you want to do into accomplishments.
Winning Strategy # 1
Continuous Improvement

- Americans often downplay the strategy of improving what they already do well
- We frequently overlook the importance of improving the process, improving the experience, improving the service, improving the efficiency, improving the effectiveness. We settle for average, ordinary, common, status quo
Winning Strategy # 1
Continuous Improvement

- We justify our lack of improvement by saying, “Our customers buy it. So why should we improve it?”
- Constant improvement means abandoning the things that no longer work. Where are we going to do something different? Where are we going to do the same thing quite differently?
Winning Strategy # 2: Abandoning Old For New

- Sometimes patching up the old rather than going for the new is a mistake.
- Sometimes we have to say, “Enough is enough. Let’s stop improving. We’ve put as many patches on those jeans as we can. It’s time to design something new.”
- Leaders need to avoid saying, “This is how we do it. It has worked for us many times in the past so it must be the right way.”
Winning Strategy # 2: Abandoning Old For New

- Instead, we should say, “Maybe this needs to be done differently. Let’s start with what we know. Let’s start with what we need to learn.”

- When a strategy doesn’t work, follow this rule: “If at first you don’t succeed, try once more. If it still doesn’t work, try something else.”
Winning Strategy # 3: Refocus and Change Following Success

- When your organization is successful, it’s time to refocus and change.
- When everyone says, “Don’t rock the boat. If it’s not broke, don’t fix it.” That’s the time you need to say, “Let’s improve it.”
- Why? If you don’t improve it, someone else will. And then you’ll lose.
Winning Strategy # 3: Refocus and Change Following Success

- Organizations that rest on their past success are the ones that get into trouble.
- Leaders must train themselves to look out the window for what’s next. They must look for change.
Successful leaders look outside first for change and opportunity. Then they look inside their organization. They don’t see change as a threat. They see change as an opportunity.

Very few organizations see their success as a call to action. Does yours?
Dues paying members are stagnant
Increase in Resident members
Ask the AOA about their free membership for 1 year was successful
Training sessions on developing a GME program
Expand the association’s role in the promotion of osteopathic medicine and patient care

- Legislative advocacy
- Provide information for physicians to put in their waiting rooms and on their websites
- Add to TOMA website
Encourage physicians to utilize the CAP program

Mentorship program
- Work with TOMA SO
- Developing a list of physicians willing to take out of state students for rotations
- Need a feedback loop
- Face book Page
- Mentoring new physicians
- Need a Mentoring Champion
- Send out an e-mail for mentoring, TOMA website
TOMA Strategic Planning
February 12, 2010

- Have Lydia send copies of press releases to district presidents
- Look into starting a Leadership academy (TMA has one)
- Committee participation is the responsibility of the chair
- Ultimate responsibility is the President who appoints committee members
- TOMA is involved in a number of joint advocacy activities
TOMA Strategic Planning
February 12, 2010

- Need to have a rainy day fund equal to 6 months of operating expenses
- Endowments through the Foundation
- Development of an osteopathic museum
Healthy & Viable mandates from AOA
- Implementation of Records Retention and Destruction Policy
- Link Strategic Plan to budget
- Job descriptions for district officers
- Annual Board member orientation
- Executive Director goals need to mirror association goals
QUESTION: How many of these goals have been completed, tracked, monitored for progress, etc.?
House of Delegates—TOMA needs to make sure the TMB is aware of the changes
Posting list of physicians willing to take osteopathic medical students—Lucy will work with Elaine at the ACOFP
TOMA Face book page—Needs to be easily accessible and continuously monitored
Establishment of a reserve fund—Ad Hoc committee of the Executive Committee
TOMA Strategic Planning
February 11, 2011

- Grant proposal for childhood obesity – Foundation
- On-line surveys for TOMA members
- Change name to Healthy & Viable Affiliates Program
- Discussion of adding one or two district presidents
QUESTION – How many have been implemented, etc.?
TOMA Strategic Plan
February 4, 2012

- Grants from TOMA Foundation
- Find companies willing to pay TOMA members to gather information from their patients — first project, childhood obesity
- Re-districting Committee — investigate whether there is a need
- New committee structure
- Strategic Planning Committee should coordinate issues from all the committees
Establish a Technology Plan

- The Information Technology/Website Committee needs additional members
- Strategic Planning Committee should give Information Technology/Website Committee a specific charge
- Sam Tessen will contact TMA to see what they are doing
- Assist TCOM students in setting up a parallel plan
Employment Issues
- Design TOMA Employment Application
- Update Administrative Guide
- Include process for applying & hiring
- Include a cross training plan with job descriptions and an organizational chart
- Update the Employee Handbook
- Charge given to the Executive Director
TOMA Strategic Plan
February 4, 2012

- Charge the Executive Director with investigating the outsourcing of some TOMA duties to present to the TOMA BOT for review and approval
- Consider moving MidWinter to Austin during legislative years and combine with DOME Day
- Consider a dual track for presentations—Family Practice vs. other specialties
- Recommended to continue MidWinter in DFW area
Suggestion to change the name of the Strategic Planning Committee to the Healthy and Viable Affiliates Program

Charge the Executive Director and President to ensure that TOMA is in compliance with the AOA requirement that TOMA’s budget match its Strategic Plan

Develop measurable goals and objectives for the Strategic Plan
How many of these ideas from 2012 have been initiated, tracked, measured, etc?
2013 Strategic Planning

- Possible Resolution for 2013: Advance in a Positive Direction
- A plan is progress, not perfection
- The past is over, forget about it
- The future holds our hope, reach for it
- The secret, is a determined attitude, maintain it
- The need is keeping a high standard, together
- Make deliberate progress, measure it
- FBC CC sermon notes January 6, 2013
Insanity Definition

- Doing the same thing over and over again and expecting different results
- Albert Einstein
- He also said: “To solve the significant problems that we face requires a different level of thinking than we possessed at the time they were created”
A well developed strategic plan can leverage our advantage
We must know who are “customers”
What do our customers want?
What value does TOMA add to our customers?
Have we done a recent “SWOT” (Strengths, Weaknesses, Opportunities, Threats) analysis of TOMA?
Strategic Planning Concepts

- **Vision**
- Describes the destination
- It is what we aspire to be under ideal conditions/circumstances and without resource constraints
- It should be in one sentence and deal with what is the ideal state of our organization
- The vision is not an outcome and does not need to be measured
Mission
Defines the product
It is what we intend to do under the conditions/circumstances that exist at this time and with the resources available
It should state in one sentence what do we intend to do as an organization
It is not required that the mission be measurable, but an organization should be able to describe how it is meeting its mission when asked
Values
Define the culture
They are what we believe to be important as an organization; the actions, decisions, and risks we take as an organization should always be weighed against our values
Objectives

Drive the system to achieve our mission and direct us toward our vision

The success of most organizations begins to diminish when they exceed more than three major objectives at any one time
Strategic Planning Concepts

- The objectives we establish need to be measurable in some way (progress or outcome); difficulty measuring whether or not objectives are being realized is often a weakness of the choices made by an organization
- Objectives are best written as short statements
Goals

Are a way of specifically measuring our success

One option is to set goals around the following categories commonly used by hospitals and businesses to create their operational dashboard: Quality, People, Service, Growth, Finance
Goals typically operate in concert with our objectives/tactics. They help to tell us how well we are doing. They help us identify gaps and work toward improvement.
Tactics

Are the projects that help to make our objectives and goals a reality

Each tactic should be developed in a way that helps us to reach the desired objective/goal

They are added or abandoned as necessary to facilitate reaching the desired objective/goal

Tactics must be measurable (process or outcome)
Our vision statement and our values should point us in the desired direction

TOMA’s Vision: TOMA wants to be…

Values (examples include Advocacy, Leadership, Stewardship, Trustworthy, Collaborative)
Our mission statement should always keep us focused on the task

TOMA’s will...
Strategic Planning Concepts

- TOMA needs to keep its Strategic Plan Visual
- Our final product should have a theme with an easily understood visual that is referenced at all TOMA activities and incorporated regularly into communication with our stakeholders
- The visual helps to make the Strategic Plan a “living” document
Strategic Planning Concepts

- One advantage of a strong continuous strategic planning process is maintaining organizational stability over time.
- The plan should serve to provide continuity when leadership, board membership, or staff changes occur.
- Variability in performance is reduced and movement toward defined objectives need to be sustained.
Strategic Planning Concepts

- The development of planning cycles is useful for maintaining movement of the strategic plan (Each BOT meeting)
- The cycles should include efforts to define organizational direction, ongoing information management and active planning, and execution and assessment
Strategic Planning Concepts

- Needs to promote the bi-directional flow of information, outward from leadership and inward toward membership
- This model creates the foundation necessary for a learning organization to exist, the result of which is ever increasing effectiveness
Formal Planning Cycles are required
This is needed to maintain organizational stability
This sets organizational direction
A typical Macro cycle (Big Picture) is 5 years
Should have input from recognized stakeholders
TOMA leadership’s primary duty is to produce the outcomes by this plan
Each President can focus upon certain aspects of the organization for improvement, but overall, organizational directions has to be set in advance.

The TOMA Leadership will need to be the caretaker of the plan, acting to move it forward.

A Micro cycle would typically be more rapidly turning cycle (i.e. Presidential term).

New tactics can be added by each President.
Strategic Planning Concepts

- All aspects of the plan should be reviewed frequently for their contribution to the success of the organization.
- Building continuous planning into the DNA of our organization requires components of the strategic plan be addressed at all functions: committee meetings, executive committee meetings, and board meetings.
- Also need a task force to monitor planning activities, provide input to continuous planning, and to coordinate the planning process.
Informal Planning Cycle
This represents the point where execution and assessment take place
Components may occur regularly or as needed
Planning is specific to the tactic (task) and carried out by committee leaders
Outcomes associated with the tactics must be measured and reported to the BOT
Strategic Planning Concepts

- Relationship with the Budget Development Process
- Ideally the Strategic Plan should drive the budget development process
- Melding the continuous strategic planning process and the budget planning process is improved by shifting the budget to follow the calendar year
Conclusion

- This process is not the ownership of one individual, but should be the ownership of the organization and its leaders.
- Can we as an organization improve this process to allow us to move our organization forward?