

**ASSOCIATION  
OF  
OSTEOPATHIC STATE EXECUTIVE DIRECTORS  
  
STRATEGIC PLAN 2017**

**DATE TBD, 2017**

**Facilitators**

**Angela Cole Westhoff  
President, AOSED  
Executive Director, Maine Osteopathic Association**

**David Walls  
Immediate Past President, AOSED  
Executive Director, Osteopathic Physicians & Surgeons of Oregon**

**Ed Williams, PhD  
Trustee, AOSED  
Executive Director, Louisiana Osteopathic Medical Association**

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AOSED expresses sincere appreciation to the Strategic Planning Committee for its leadership in conducting the comprehensive strategic planning process and creating this guiding document. All other state association executive directors are also acknowledged and appreciated for providing valuable input to this process.

**Strategic Planning Committee members include:**

Brian Bowles, Missouri

Kathleen Creason, California

Suzanne Frederick, AOSED President-Elect, Idaho

Barbara Greenwald, New York

David Walls, AOSED Immediate Past-President, Oregon

Angela Cole Westhoff, AOSED President, Maine

Ed Williams, PhD, AOSED Trustee, SPC Chair, LOMA

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## INTRODUCTION

Association of Osteopathic State Executive Directors (AOSED) was originally organized in 1918. Its purposes as stated in the 2014 Bylaws are to: (1) facilitate development of strong divisional societies of the American Osteopathic Association; (2) to promote closer affiliation of divisional societies and coordinate their programs; (3) to provide communication, professional development, training, and continuing education for its members; (4) to develop programs and materials which promote the osteopathic profession; and (5) to provide input or advice to the American Osteopathic Association.

AOSED's affiliate member executive directors, the unified osteopathic profession, and its national governing body, the AOA, collectively call for AOSED to maintain a healthy and viable status that supports the Mission, Vision, and Goals of all stakeholders. AOSED was formally incorporated by the AOA as a State of Illinois Not-for-Profit Corporation on March 26, 2008 and currently exists under that status.

The Strategic Plan 2017 is based upon review of current and projected external and internal environments within which the Association operates. This Strategic Plan is also based upon the restrictions, opportunities, and obligations under which AOSED now exists as well as the current and projected needs of its member and non-member stakeholders. The most recent previous strategic planning session occurred from October 1997 to June 1999. The goal was to strengthen and align AOSED's vision and goals with the changing visions and goals of the AOA during its Unity Campaign.

The herein stated Mission, Vision, and Goals are sound in theory and purpose. AOSED will continue to improve existing and develop new programs, procedures, policies, and services for its members. By doing so, AOSED will be working to meet the needs of all stakeholders within the osteopathic profession.

The Strategic Planning Committee began its work with review and revision of the Association's Purposes, Mission, and Vision. This Strategic Plan 2017 as based on those three defining statements will be the basic guide directing future decisions. However, AOSED shall view the Strategic Plan 2017 as a "living document" which must remain flexible and allow necessary changes to address evolving needs and environmental pressures that will influence the osteopathic profession and its affiliate members.

Just as the Strategic Planning Committee used a system of strategic thinking to develop the Mission, the Vision, and this Strategic Plan, so shall AOSED's leadership employ a strategic thinking process as it moves forward to develop and implement its action plan. Such frequent analytical review of the Association's programs and practices, in a changing environment, will lead to timely and appropriate decision-making by its leadership. AOSED leadership will adopt and strive to soundly implement the following touchstones in its strategic thinking process:

- Integration
- Effective Communication
- Organizational Efficiency
- Excellence in Member Service
- The Osteopathic Pledge of Commitment
- The Code of Leadership
- Core Values
- Technology Enhancements
- Financial Prosperity
- Governance

Based on a review of its history and the environment within which AOSED operates, the Strategic Planning Committee concluded that AOSED must focus its efforts on four “Strategic Paths”. These paths are fundamental areas of concentration where energy and resources will be focused to develop, implement, and enhance policies, programs, and services. The Strategic Plan 2017 is thus based on four Strategic Paths:

- Organizational Structure
- Collaboration/Networking
- Resources/Support/Education
- Advocacy/Awareness

Successful implementation of the Strategic Plan 2017 requires strong commitment of AOSED leadership, members, and staff. AOSED has the collective experience base and un-tapped raw potential to be a viable organization that can proactively anticipate and meet the needs of its stakeholders. Its Mission and Vision as stated herein, in concert with the profession’s Osteopathic Pledge of Commitment, provide AOSED’s fundamental guidance in developing its goals. However, achievement of its goals in a satisfactory manner will take the continued focus, sacrifice, and industry of many. These goals are overlapping in that no one goal can stand alone. Innovative and integrative thinking, planning, and action, will lead AOSED in overcoming obstacles to achieving its stated Mission, Vision, and Goals.

### **AOSED MISSION**

The revised mission statement of the Association of Osteopathic State Executive Directors is:

“The Association of Osteopathic State Executive Directors’ mission is to empower state osteopathic associations in facilitating advancement of the osteopathic profession.”

## **AOSED VISION**

AOSED will be the foremost resource for state osteopathic associations.

## **THE OSTEOPATHIC PLEDGE OF COMMITMENT**

AOSED has formulated and will implement this Strategic Plan 2017 while being cognizant of the ultimate goal of the profession as stated in physician's Osteopathic Pledge of Commitment:

I pledge to:

Provide compassionate, quality care to my patients;

Partner with them to promote health;

Display integrity and professionalism throughout my career;

Advance the philosophy, practice and science of osteopathic medicine;

Continue life-long learning;

Support my profession with loyalty in action, word and deed; and

Live each day as an example of what an osteopathic physician should be.

## **ENVIRONMENTAL ANALYSIS**

The Strategic Planning Committee conducted an environmental analysis using standard SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats). That SWOT analysis identified various strategic paths and processes for consideration. Based on the information reviewed, the Committee was then able to determine the major focus and strategic paths as incorporated into this Strategic Plan 2017.

### *External Environmental Factors*

The national as well as individual state environments have never been better for development of the osteopathic profession. However, developmental challenges still remain as many states have progressed slowly in development of their respective osteopathic professions. As a result, many state osteopathic associations are still designated by the AOA as "emerging divisional societies" and still experience significant restrictive issues to further advancement of the osteopathic profession. The AOA is a strong advocate for continued development of the profession within individual states and has encouraged and supported AOSED's efforts since its organization. The AOA's continued involvement is a desirable and positive factor for AOSED. Active participation of physicians from each state osteopathic association in the AOA House of Delegates, executive director participation in the Bureau of State Governmental Affairs, and their service as members on various other AOA Bureaus, Councils, and Committees all provide examples of collaborative efforts and offer further opportunities for positive influence in AOSED's future.

Resolution of the historic negative legal and political environments that once existed in many states has provided them a level playing field conducive to accelerated development of the osteopathic profession. The larger profession and AOSED member executives have developed strategic alliances within the various allopathic state medical associations which have traditionally welcomed DOs into membership. State osteopathic associations also hold close ties with their state medical licensing boards. Many state osteopathic associations are very involved politically and legislatively in their respective states. Today, osteopathic physicians enjoy an environment throughout the US that is generally equitable and accepting of their profession. This level playing field now provides parity in licensing of osteopathic physicians and has resulted in increases in the number of licensed DOs practicing within many emerging states. As the profession grows, especially within emerging states, so does the opportunity for AOSED to respond by further developing its services, in aligning its functions, and in extending its reach in collaborative support of the developing profession.

The historical bias that led to past discrimination against osteopathic physicians will continue to negatively impact growth of the osteopathic profession in emerging states to some extent. The lay public, many physicians, and others in the health care industry remain largely unaware of the issues of equality concerning the osteopathic profession, a fact that represents a long-standing challenge but also presents new opportunities for the AOA and AOSED. Lack of adequate advocacy and public awareness of the osteopathic profession within many states is a negative factor that will allow such current and lingering bias to persist for years to come unless intervention occurs. AOSED must be assertive in assisting state affiliates in addressing and overcoming this threat.

#### *Internal Environmental Factors*

The most important positive internal environmental factor within AOSED is the focus and determination of its dedicated and motivated leaders and its state level executive directors. Those executive directors have long advocated for change and are determined to see the osteopathic profession grow within their states. Moreover, AOSED has responded supportively as the profession has grown significantly over the last several years. Growth has come partly from an influx of new DOs into smaller emerging states as well as from resident physicians who have at last realized the importance of active membership in their state associations. But there is a limit on potential total number of state associations and thus potential size of AOSED. There has been significant turnover of affiliate executive directors such that new talents and resources are brought into AOSED. At the same time, experienced AOSED leaders and contributors have ended their tenures resulting in significant loss of their valued contributions and services. New AOSED members need assistance and guidance and in turn will be recruited to enhance continued development of AOSED. There unfortunately remain a significant number of executive directors who are not active in AOSED for varied reasons. Such non-involvement is a threat to program and service

continuity and efforts should be increased to recruit those executive directors for service to AOSED. They are an opportunity as their need is great for collaboration with other executive directors in achieving their individual goals. Such need presents opportunity for further development of an increased level of AOSED camaraderie that will continue to grow stronger and help AOSED increase its service and resources. AOSED members have always served by assisting and guiding each other in the business of running their respective osteopathic associations and those opportunities will remain. Continued development of state associations and changes in their modes of operation will provide many future opportunities and challenges for AOSED.

## **STRATEGIC GOALS**

Developed goals stated in this Strategic Plan 2017 are attendant to the needs of AOSED's member executive directors, the state osteopathic professions served by their respective state associations, and the citizens who need quality health care in their attendant communities. They also align with and demonstrate AOSED's allegiance to the AOA's goals. Each goal should be considered as influencing all other goals and should not be viewed in isolation. By taking this integrated approach to implementing the Strategic Plan's actions, AOSED will best delegate its talents and resources to make the most significant impacts possible.

The immediate paths for AOSED development of action plans are continued refinement and further development of organizational structure and policies, continued growth and active involvement of its membership base, and increased member benefits through programmatic development. Specifically, AOSED will focus near-term efforts on the following:

- Review fundamental AOSED organization and policy
- Review current AOSED 2014 Bylaws
- Membership growth and participation initiatives
- Professional services, resource database, and technology development
- Revenue-sharing program development
- Enhance partnership standing and collaboration with the AOA
- Expand collaboration on CME conferences, seminars, and meetings

## **ULTIMATE GOALS**

Longer term, AOSED will be the premiere organization with the prominent role of providing a supportive network for osteopathic state executive directors. AOSED will be a major force helping members reach their respective goals as they work to facilitate operations within their state osteopathic associations. To accomplish these goals, AOSED will continue to revise and enhance its efforts to assist affiliate executive directors in their efforts to:



- Build efficient and competent organizational and operative business models
- Advocate for and promote the osteopathic philosophy and practice of medicine
- Provide quality CME programs and non-CME educational opportunities
- Build public awareness of osteopathic medicine
- Promote the delivery of quality cost-effective health care

## **STRATEGIC PATHS**

AOSED's four Strategic Paths are viewed as interactive and influencing each other. It is thus essential that AOSED leadership remain cognizant of the overlapping nature of its Strategic Paths. As this Strategic Plan 2017 is implemented, all action items must integrate the separate Strategic Paths such that outcomes are appropriately optimized.

### *Organizational Structure*

An effective and efficient organizational structure with appropriate procedures and policies is critical to a well-run, nimble, and responsive organization. AOSED's organizational structure was reviewed and revised in the 2014 Bylaws and the 2016 Policy Manual. Much has changed in the national environment over the last decade and many additional changes are ongoing within the osteopathic profession. These challenges collectively signal a need for AOSED's preparedness and readiness to make significant change in its priorities and functions. It must anticipate and institute appropriate change in a timely manner to meet and solve organizational issues. Fortunately, advice, assistance, and guidance are available from the AOA, from within AOSED, and from individual state osteopathic associations who have individually or collectively experienced new opportunities and threats. There is generally no need to invent a totally new process. However, installing and integrating new operative procedures or revising existing processes in an evolving organization can be a massive undertaking often complicated by insufficient funding and/or leadership/staff resources. A continuous audit will be conducted to assess appropriateness and priority needs in organizational structure and operations. Efforts will be made to identify which practices are current and appropriate and which are in need of development or change. While working to optimize its organizational structure, AOSED will remain attendant to the need to do so in concert with strengthening its value to the state association executive directors it serves. Changes will be made and implemented on a priority basis as resources are available.

### *Collaboration/Networking*

AOSED will strive to increase its collaborative work with the AOA and osteopathic state societies for the purpose of mutual organizational benefit and to aid all associations in meeting their foremost goal of empowering members to provide quality, cost-effective, osteopathic health care. Commitment to active partnership at all levels will facilitate

the intermediary role of AOSED and augment development of the osteopathic profession nationally and in individual states. It is obvious that building strong collaborative alliances with the AOA and individual state osteopathic societies will have rewarding benefits for AOSED member executive directors, for their member physicians within their home states, for their respective patient populations, and for the osteopathic profession as a whole. These alliances are encouraged and greater affiliations will be necessary for continued growth of all stakeholders.

### *Resources/Support/Education*

AOSED will serve as the foremost resource for state osteopathic executive directors. All educational programs, supportive services, and resources must be designed to directly address and satisfy expressed member needs, provide a sense of pride and community, and build loyalty to the purposes of AOSED. All state association executive directors will be encouraged to participate and contribute to the ongoing evolution of AOSED as it strives to strengthen and provide excellence to its members. Assessments of needs and inventories of talents of individual state executive directors provide the basis for modification of current member benefits and development of new programs, services, and resources to optimize and strengthen AOSED's value. AOSED's member meetings, peer-to-peer mentoring opportunities, sharing of executive directors' expertise and skills sets, data sharing, collaborative projects, and library of professional resources will all be optimized to provide comprehensive education, resources, and support to AOSED members. The AOSED website, list serve, and other mechanisms will be designed to provide valuable best-practice resources for its members. All state association executive directors will be encouraged to participate and contribute to this ongoing evolution of AOSED as it strives to strengthen and provide excellence to its members.

### *Advocacy/Awareness*

Attendant to the nature of AOSED's mission, advocacy and awareness of the osteopathic profession crosses all other Strategic Paths. AOSED will assist state executive directors with advocacy efforts on several fronts.

First, AOSED will seek to increase public awareness of osteopathic medicine. Tools and resources will be developed to assist executive directors in increasing the general public's knowledge of the osteopathic profession within their respective states. AOSED will strive to assist state associations in educating the public on the unique philosophy and approach to health care provided by their osteopathic physicians.

AOSED will also provide training opportunities in effective advocacy for its members. Executive directors and their lead physicians need to effectively represent the profession at all governmental and regulatory levels for benefit of the member physician, the osteopathic profession, and the health benefits available to the lay public. AOSED's smaller voice can best be heard by continuing its joint advocacy efforts with

the AOA and through supporting its affiliates with training opportunities. Successful advocacy efforts will ensure that osteopathic medicine and DOs are represented accurately in public forums and the media at the state level.

## **STRATEGIC THINKING**

In working to achieve its Goals and address its four Strategic Paths as set forth in this Strategic Plan 2017, AOSED leadership will utilize a systemic strategic thinking process to evaluate all procedures and programs as developed or altered. The following touchstones will be used when developing, evaluating, and/or altering programs, services, or operational policies:

### *Integration*

Decisions cannot be made in isolation. As an intermediary supportive link between the AOA and individual state osteopathic associations, AOSED must strive to strengthen partnerships and collaborations with those entities. Each program, policy, or service must, where appropriate, benefit or at least be neutral to all other AOSED, AOA, and state osteopathic associations programs, policies, and services. In the spirit of collaboration, all AOSED efforts will be consistent and seamless where possible with programs, policies, and services of the AOA and other affiliated partner organizations.

### *Effective Communication*

All new proposals, programs, policies, and changes will be effectively communicated to inform constituents and collaborative partners.

### *Organizational Efficiency*

All programs, services, and policies will be produced and managed as efficiently as possible and AOSED leadership will continually apply quality improvement principles to all its work.

### *Excellence in Member Service*

AOSED leadership and its staff will ensure that members receive the best service possible within its financial and time limitations.

### *The Osteopathic Pledge of Commitment*

Designed programs and services will assist AOSED members in their work to support their physicians in fulfilling their Osteopathic Pledge of Commitment.

### *The Code of Leadership*

The AOSED Executive Committee and Board of Directors will adhere to a Code of Leadership that includes: maintaining and strengthening AOSED's Mission and Vision; conducting oneself with integrity and professionalism that honors the profession and supports its ideals; and acting competently to assure soundness of finances and all procedures.

### *Core Values*

Programs, services, and procedures will support the core values of quality, member service, collegiality, empowerment of members, and effective governance.

### *Technology Enhancement*

Programs, services, and procedures will incorporate new technologies to assist executive directors in fulfilling their organizational and operational roles.

### *Financial Prosperity*

A program, service, or procedure will assist AOSED in being financially sound and sustainable.

### *Governance*

AOSED leadership will use self-assessment and member-based assessment tools to evaluate and strengthen the governance of the Association in providing quality programs and services.

## **CONCLUSION**

For much of its history, the osteopathic profession's development in many states included a formative environment of discrimination and oppression fostered by legal and political mechanisms. The profession and the state osteopathic associations endured those early threats successfully and have not only survived and emerged but have also begun to prosper. All states are now open territory to further development of the osteopathic profession as those former impediments have been eliminated. The opportunity now exists for unlimited growth of the osteopathic profession in all states even though vestiges of historical bias and discrimination still remain.

As the profession grows, there will be increased demand for AOSED to be responsive to its stakeholder needs. The Association must position itself to face change and be responsive to new challenges. Although AOSED's purposes remain much as in the past, it is no longer adequate to continue to function as in the recent past. With major

environmental changes occurring now and more on the imminent horizon, the Association must embrace needed change in its coming roles and operative mechanisms. AOSED's current leadership and staff are presently addressing developmental needs and envisioning the future of the Association based on survey input and experiential feedback from all executive director members. The additional commitment and service of all AOSED members will be needed to move effectively towards realizing these goals. Future leaders will be identified, brought into service, and recruited to participate in the efforts to make AOSED an even greater organization.

The Strategic Planning Committee envisions the Association of Osteopathic State Executive Directors as a healthy and viable organization destined to thrive in its future. AOSED will effectively promote and meet the mutual and varied interests of its stakeholders. The Strategic Plan 2017 sets the general course of action for achievement of the goals of the Association of Osteopathic State Executive Directors. Working together, AOSED members will make it happen!

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