



**Strategic Plan
2020 to 2025**

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BACKGROUND

Preamble

Twenty-eight years ago, the founding members have established the Dysphagia Research Society, Inc. (DRS) to enhance and encourage basic and clinical research pertinent to normal and disordered swallowing and related functions across the life span. The society has strived to improve the quality of life of patients with dysphagia and related consequences through sharing the advances in science discussed at its annual meetings. Over the years, the complexity of dysphagia has been recognized and the science of deglutition and related disorders has emerged. While applications of technological advances are improving longevity among patients, but with the consequences of deglutition disorders, more collaborative and team work is needed so that the patients with dysphagia gets direct benefits of this great society. There is now a greater need to overcome the newer challenges in deglutition science across pediatrics to geriatrics, bench research to clinical science translations and reverse, development of technologies for improved diagnostics to rehabilitation strategies, in addition to encouraging interdisciplinary research among members. The DRS aspires to increase its membership and educational and research activities to overcome newer challenges.

Several discussions among the DRS leadership have occurred since the 25th anniversary in Portland, OR, and all these efforts have resulted in the development of renewed commitment to DRS mission and vision. DRS leaders met at the 27th annual meeting in San Diego, CA, and agreed upon revisiting the strategy plan, by examining the current state and developing goals for the better future of DRS. Board of Directors (2018-20) have approved this strategy, and this resulted in a 2-day spirited, intense in-person deliberations in Milwaukee, WI in summer 2019. The specially composed one-time strategy planning council, i.e., executive committee, councilors, board members, past presidents, and international members, under the Badger Bay management company's facilitation met to discuss. The list of participants is included in the attached appendix-1.

A survey across the DRS leadership and its membership resulted in the development of key areas to develop in the next phase of strategy plan. Three focus-driven themes have emerged from this WI meeting: 1) Education and Research focus group, 2) Membership and Marketing focus group, and 3) Organizational structure and Finance focus group. The groups met during the meeting and presented their views. Subsequently, each of the focus group members have ranked their priority choices. All the input was utilized in the development of this strategic plan, and additional tactics to realize these goals. This document has gone into several versions, and has been developed by the strategy planning committee, with the help of the Adhoc strategy planning council recommendations. The Strategy Planning Committee-2019-2020 (members listed in Appendix 1) has approved this document unanimously and finally presented to the BOD-2019-2020 (members listed in Appendix 1) for approval.

RELEVANT COMPONENTS ARE DISCUSSED BELOW.

Mission

Support the advancement of dysphagia research throughout the world to continuously improve the quality of care in health and disease among patients with dysphagia. DRS will accomplish this by:

- Creating a community of learning among a broad interdisciplinary representation of professionals to share ideas and research;

- Providing education opportunities for members to learn and showcase research;
- Supporting the advancement of research, translations, technologies, dissemination of knowledge, and implementation into clinical practice; and
- Sharing news and information among researchers and practitioners and enhance advocacy for the patients with dysphagia publicly.

Goals

- **Membership:** Grow a diverse and engaged membership from the current base of 572 to over 715 (25% increase).
- **Education:** Increase the number of professionals participating in DRS sponsored educational activities from just those attending the annual conference to over 1,000 participants each year across all DRS sponsored events.
- **Funds:** Develop a minimum balance of \$300,000 of operating reserves; and \$700,000 balance of restricted fund balance for the Research and Education Fund with a long-term goal of 12 months of annual operating expense in reserve and \$1million R&E Fund balance.
- **Organization:** Update the Society’s organizational structure and operations to assure capacity and resources are available to support long-term plans.

Outcomes

Measure	Baseline	By 2025
Total membership	572 members in 2019	715 members
Number of international members	113 members in 2019	141 international members
Number of physician members	100 members in 2019	125 physician members
Number of attendees at DRS hosted events	477 attendees at annual conference in 2019	Over 500 attendees at the annual conference; Over 200 attendees at a second conference; And over 300 registered participants in DRS sponsored webinars.
Cash and cash equivalents	\$335,000 (reported end of 2019)	12 months of operating expense (equivalent to \$400,000)
Invested funds	\$256,000 (reported end of 2019)	\$500,000 balance by 2025; \$750,000 balance by 2030; and \$1m balance is long-term goal

KEY INITIATIVES

Special Interest Groups

A Special Interest Group (SIG) is a group with a shared interest in advancing a specific area of knowledge related to an aspect of Dysphagia Research whether it is for patient-specific, disease-specific or goal specific. Because *specific* patients (e.g. children, cancer patients, neurogenic, etc) with dysphagia need *specific* inter-disciplinary collaborations for clinical or for research, more interested clinicians/researchers are likely to take advantage once SIGs are formed. SIGs could have own committee, core groups, and full members. These formations can plan activities as per the SIG goals. SIG chairs can give a report to the BOD and EC as needed. There will likely be a budget for such SIGs at each DRS meeting. Educational sessions could be planned by SIGs for the DRS annual meeting and this will help the President and the program committee as well.

PEDIATRIC DYSPHAGIA SIG: A Pediatric Dysphagia SIG is an example of a potential group. It would be created to improve collaboration among the interested people to develop educational, research, advocacy, clinical guidelines, etc related to childhood dysphagia. In order to produce solutions within their field, under the auspices of this SIG, the committee members may communicate, meet, and organize conferences for the DRS. So, this group will develop/drive the agenda for the clinical and research related childhood dysphagia.

SIGs could help support membership recruitment and retention by creating communities of interest within the Society is possible. Currently, for example, pediatric dysphagia has no 'Academic Home'. So, more new members and conference attendees are likely to participate once the SIG is well developed. Full members will be part of the SIG initially; however, any membership category can participate in their activities at the annual scientific meetings.

Proposed policies and procedures related to Special Interest Groups include:

- Formally create **Special Interest Groups** as a component of the Society. Members of this group will then be involved for planning DRS activities or administrative issues related to address the interest of that SIG. For example, problems related to the chosen discipline, can be directed to the SIG if they exist.
- SIGs will be required to have a Chair and a core group. The core group will comprise of 6 full members who volunteer to commit to Pediatric Dysphagia SIG at the DRS. Selection of these members will be made by the chair(s) and will include interdisciplinary representation, international representation, and all-inclusive with equal gender distribution. As this concept is growing, a re-evaluation of the SIG could be considered at a 3-year review. The intent is to grow membership, establish a core group, and develop educational activities. All this will take time to evolve, hence a 3-year review is appropriate.
- The board will review funding for SIGs during the annual budget process. The budget may include a combination of general funds and other restricted funds raised specifically to support SIG activities.

Potential Pediatric Dysphagia SIG activities may include:

- The new group can help retain and recruit members through outreach and increased focused mentoring potential in that field.
- The SIG members can assist in developing conference sessions (at annual meeting or at proposed fall meeting) and webinar programs for that chosen field. Therefore, educational and patient advocacy can enhance in that field.

- SIGs are encouraged to develop grant applications to support innovative and expanded programs of interest to the SIG within the mission of DRS.
- With collaborative research initiatives, database can be developed to enhance multi-investigator collaborative activities.
- Identification of clinical and research collaborations of focused group of members to achieve common goals.

The DRS Institute for Education

There were many great ideas related to education discussed during the planning meetings. The Society can assign a number of those ideas to existing committees. While some of the other new initiatives and suggestions require additional volunteer capacity and expertise to support. The ideas suggested to as part of the scope of work for the Institute are those items that do not have a place within DRS' current organizational structure and would therefore be assigned to the Institute to develop. Whether or not these new initiatives once developed remain part of the institute or become their own free-standing committee will be evaluated at a 3-year review.

The Institute will help “incubate” new ideas and initiatives within DRS that help to advance the Society’s research and educational mission, in addition to the work that is otherwise being completed by other committees.

The budget for the Institute would be approved and provided by the Board during the annual budgeting process.

The Institute’s scope of work would include:

- Initially planning the recommended “second” conference;
- Recommend and promote an annual webinar series;
- Develop consensus documents and position statements;
- Develop publications from the proceedings of the Society’s meetings in collaboration with the Dysphagia Journal;
- Develop interdisciplinary collaboration among members and enhance data sharing options; and
- Develop grant applications to support educational activities.

The proposed leadership structure for the DRS Institute for Education would include:

- A DRS Board of Directors confirmed Chair based on the advice of the nominating committee
- The DRS President and DRS President-elect as ex-officio voting members
- Up to 6 other members recommended by the Institute Chair and confirmed by the board (similar to the committee member plans)
- The specific length of terms is to be determined, with the goal of having a sustained and consistent representation on the Advisory Council. All inaugural members of the DRS Institute for Education will have 3-year terms and conclude after the initial evaluation of the Institute. Any of the inaugural members may continue for successive terms, following the review and evaluation of the Pilot Program. One should be a prominent senior clinician. Members would be recognized for their academic and scholastic status and represent a diverse background. Mid-career level academician should be on the committee.
- Selection of the members of the DRS Institute for Education will include interdisciplinary representation, international representation, and equal gender distribution. As this concept is

growing, a re-evaluation of the DRS-Institute for Education could be considered at a 3-year review.

PLANS

The following describes the proposed plans, relationship to goals and key implementation tasks over the next 3 years.

Programs

Description	Relationship to Goals	Implementation
<p>Develop and archive a set of webinars. Free to members, approved for CE credit and archived as long as relevant. May include recorded sessions from the annual conference.</p>	<p>Adds value to current and prospective members, provides more opportunities for members to attend events during they year, and greater membership and/or event registration helps generate more revenues.</p>	<ul style="list-style-type: none"> • Minimal expense for recording and archiving webinars. • Other potential costs and resources for: AV to record session(s), staff time to manage additional projects and CE for courses (which is not currently in the staff contract). • Courses offered by other organizations free or reduced costs to our members can be posted on the website’s calendar of events at no cost. • Would recommend recording one session from 2020 conference and producing a second recorded program in 2020 (webinar). • This would be tasked to the proposed DRS Institute for Education with input on topics and partners from the board, committees and sections.
<p>Host and produce a second conference during the year.</p>	<p>Adds value to prospective and current members. Provides an additional program during the year to provide more or different content. Would help increase event attendance. And additional event(s) could</p>	<ul style="list-style-type: none"> • It was agreed the second conference would have a smaller and more specific focus than the current annual conference. This would be tasked to the

Description	Relationship to Goals	Implementation
	generate more non-dues revenue.	<p>proposed DRS Institute for Education.</p> <ul style="list-style-type: none"> • A second conference is not within the current budget and would need to be approved by the board. • A second conference may be able to fund itself but would require a budget and plan. • The second conference would also require additional staffing that is not currently in the staff contract. • If approved, would need to be planned in 2020 for first conference in 2021. • Planning for the second conference would be assigned based on the focus and content for the conference.
Develop a process to produce Consensus Papers on current and emerging issues.	Helps to recruit and retain members by sharing information on current and emerging issues of interest to current and potential new membership audiences. The papers could also provide topics of interest for a conference or webinar.	<ul style="list-style-type: none"> • Would require member leaders to volunteer to lead and participate in workgroups. • Recommend establishing a policy and procedure to guide selection of topics and development of papers. • Convene first workgroup in 2020 with results shared late 2020 or 2021 with the conference. • This work would be tasked to the proposed DRS Institute for Education.
Establish a standard annual conference schedule that both supports the Society’s new initiatives (e.g., highlight SIGs during the conference) and supports the Society’s financial goals.	Expand current organizational resources by standardizing some planning elements of the conference, potential financial benefit of better bidding future conference locations with a standard conference schedule	<ul style="list-style-type: none"> • Change would require board approval, but can be done without additional budget or policy. • Recommend discussing and updating after 2020 conference evaluations.

Description	Relationship to Goals	Implementation
	and improved timeline for coordinating different aspects of event planning (e.g., selection and notification of conference speakers).	<ul style="list-style-type: none"> • This change would be reviewed and approved by the board starting with planning for the 2021 conference.

Operations

Description	Relationship to Goals	Implementation
Update the website to provide more resources for members, host webinars and other recordings and post career resources.	Help recruit and renew members by providing a more valuable website, and support promotion of new educational products.	<ul style="list-style-type: none"> • Updated website would require additional expense for the redesign and update of the current site. • Could also result in greater (or lower) annual website expense if a different platform is chosen. • Updates to the website could be started as soon as the board approves an initial re-design budget and would continue until complete (estimate 3-6 months to complete). • This work would be tasked to the Marketing and Communications Committee.
Adjust conference registration rates so physician and dentists pay the same as allied health professionals – and the only differences are member/non-member, and whether or not a member is in training.	Recruit and retain physician members; and recruit more physician members to attend the annual conference.	<ul style="list-style-type: none"> • The updated conference registration rates <u>are</u> currently included in the draft 2020 budget.
Decrease registration rates for 1 st time conference attendees	Supports member engagement and attendance at events by providing a more affordable opportunity for new attendees to participate in the conference.	<ul style="list-style-type: none"> • Would require a budget update. The cost of the discount could be offset by increased attendance. • Would recommend only offering to members. • Could be difficult to monitor and enforce the discount

Description	Relationship to Goals	Implementation
		depending on the database' capabilities.
Update operation of the R&E Fund to support a combination of short-term programs and long-term goals that help advance the Society's mission.	Grow funds to provide increased for research.	<ul style="list-style-type: none"> • define the Society's invested funds as the Research and Education Fund; • Define what programs the Fund supports; • Develop an Investment Policy Statement; • Develop a Finance Committee; • Develop a reserve policy; • Interview and select a fund manager; • Schedule Finance Committee meetings, and at least one annual report to the board. • This work would be assigned to a Finance Committee.
Update the calendar of operations in order for (a) planning and budgeting to be completed at least 90 days before a new membership year, and (b) the transition in leadership to be completed before the annual conference.	Support current and incoming leaders to be better prepared to manage their board and/or committee responsibilities.	<ul style="list-style-type: none"> • Adopt the current strategic plan by end of September; • Adopt an annual workplan and budget by October 2019, and September of each year after; • Incoming President to identify and recruit committee chairs by end of year, and invite them to orientation at the annual conference; • All current board, committee chairs, SIG chairs and other invited guests participating in midyear planning meeting on an annual basis (review strategic plan during interim years, and update plan every 3 years). • These plans would be assigned to the Executive

Description	Relationship to Goals	Implementation
		Director to implement by the 2020 annual meeting.

Organization

Description	Relationship to Goals	Implementation
Modify the membership tiers to help grow membership and make membership more inclusive. Eliminate the requirement to have published and combine the Full and Associate category into one.	Support membership recruitment and retention eliminating barriers to joining.	<ul style="list-style-type: none"> • Introduce bylaws amendment for member in 2020; • Update the membership marketing material for launch and full implementation with the 2021 membership. • This work would be tasked to the Membership Committee to make recommendations, for board approval and then bylaws approval by the membership.
Formally create Special Interest Groups as a component of the Society.	Support membership recruitment and retention by creating communities of interest within the Society.	<ul style="list-style-type: none"> • Develop a policy on SIGs for board approval before the end of 2019; • Pilot the SIG concept with the Pediatric SIG and Early Investigator SIG; • Provide time for Pediatric SIG to meet at the annual conference and provide feedback; • Update the bylaws with language to support development of more SIGs; • Accept requests to form up to 2 new SIGs each year, with applications reviewed and approved in time to include SIG sign-up with membership application. • NOTE: recommend limiting the number of new SIGs each year as the SIGs have

Description	Relationship to Goals	Implementation
		<p>some budget and other impact.</p> <ul style="list-style-type: none"> • This work would be tasked to staff to make recommendations, for board approval and then bylaws approval by the membership.
<p>Transition the Early Investigator Sub-Committee of the Program Committee into a separate Committee.</p>	<p>The new group can help retain and recruit members through outreach, and increased mentoring potential. Can assist in developing conference and webinar programs. And can help request grant funds to support programs of interest to early investigators.</p>	<ul style="list-style-type: none"> • Pilot the committee during 2020; • Coordinate session at 2020 Conference; and • Establish as formal Committee after bylaws adopted.
<p>Update Awards and Scholarships plans.</p>		<ul style="list-style-type: none"> • Review and recommend changes to current awards and scholarship plans prior to the 2020 conference; • Implement initial changes as part of the 2020 conference; • Implement any bylaws dependent changes after bylaws approved; and • And integrate new awards and scholarships plans by June 2020 for the 2021 year. • This work would be tasked to the Awards Committee to make recommendations, for board approval and subject to approval by the membership if changes require bylaws change.
<p>Update the board structure and nominations and elections process. Review and modify the number of board members, terms, nomination and elections process.</p>	<p>Provide enough board and leadership capacity to support current and emerging initiatives.</p>	<ul style="list-style-type: none"> • Review and recommend changes to the board structure for board review before end of the year; • Draft and publish related bylaws changes for member

Description	Relationship to Goals	Implementation
		review and action at the annual meeting; <ul style="list-style-type: none"> • Implement bylaws changes in 2020 for board elected to start serving in 2021. • This work would be tasked to an Ad Hoc “Governance Committee” to make recommendations, for board approval and then bylaws approval by the membership.
Develop formal partnership agreements with the ESSD and JS DR. A partnership could provide members that join both organizations with a discount in membership, discounts at conference(s); reciprocate invitations for leadership to attend each other’s’ annual conference; standard expectations for the World Dysphagia Summit; and standards for promoting a shared world dysphagia day.	Support membership recruitment and retention among members that may belong to multiple organizations and encourage attendance from members of other societies.	<ul style="list-style-type: none"> • Evaluate options for joint agreement with other societies during last quarter of 2019; • Draft agreement for review in first quarter of 2020; • Meet with representatives of the other societies at the annual conference to adopt an agreement. • This work would be tasked to the Executive Committee to make recommendations, for board approval at the 2020 Annual Meeting.

IMPLEMENTATION

Update Bylaws

The current plans include a number of potential bylaws changes. Recommended that these all be developed together, and introduced together for membership review/action at the 2020 annual meeting. Potential changes include:

- Membership categories and criteria;
- Committees and special interest groups -which may include a Finance Committee and DRS Institute for Education
- Board structure and terms; and
- Scholarships and awards.

Update Board Policies

There are also a number of policies that will need to be created or updated to support the proposed plans. All policies require board approval. The following policies and their proposed review dates are:

- Special Interest Groups (before end of 2019 to guide the pilots in 2020)
- Awards and Scholarships (before end of 2019 with plans to implement changes in 2020 and 2021)
- Partnerships (before 2020 annual meeting to present to partners at that meeting)
- R&E Fund and Investment Policy Statement (before midyear planning meeting in 2020 to guide 2021 budget development)
- Consensus papers (establish a group in 2020 to develop recommendations to pilot first before the 2021 annual conference)
- Develop and manage annual leadership orientation for board members and committee chairs. Include a review of key policies, including the conflict of interest policy.

Develop and Adopt Budget

There are also a number of budgetary items. Not all can be implemented in time for the 2020 budget, but should be scheduled ahead. These include:

- Second conference (would need to plan in 2020 and include in 2021 budget)
- Website costs (include in 2020 budget)
- Conference registration rates: standardize for physicians and dentists, and discount to first-time attendees (include in 2020 budget)
- R&E fundraising (include in 2020 budget and ongoing)
- Update membership levels (plan for in 2020 and include in 2021 budget)
- Special Interest Groups (support pilots in 2020; support more ongoing as budget can support)
- Awards (include plans in 2020 budget; modify in future budgets depending on changes).
- Staffing contract (is currently due for renewal, and may need to be updated based on board approved plans).

APPENDICES

Appendix 1: 2019 President's Dinner Participants

Joan Arvedson
Arash Babaei
Jonathan Bock
Heather Bonhila
Martin Brodsky
Clare Burns
Pere Clave
Nadine Connor
James Coyle
Stephanie Daniels
Rinki Desai
Pamela Dodrill
Sebastian Doeltgen
Kulwinder Dua
Lisa Duizer
Daniele Farnetti
Rebecca German
Karen Hegland
lanessa Humbert

Kate Hutcheson
Yoko Inamoto
Harry Ingleby
Sudarshan Jadcherla (Chair)
Hanneke Kalf
Cagla Kantarcigil
Mark Kern
Susan Langmore
Maureen Lefton-Greif
Andrew Lotto
Georgia Malandraki
Jeanne Marshall
Bonnie Martin-Harris
Rosemary Martino
Koichiro Matsuo
Tim McCullough
Gary McCullough
David McFarland
Katlyn McGrattan

Barbara Messing
Anna Miles
Art Miller
Ravinder Mittal
Sonja Molfenter
Jenny Reynolds
Joel Richter
Reza Shaker
Alan Silverman
Margaret Skinner
Barbara Sonies
Catriona Steele
Neelesh Tipnis
Michelle Troche
Doug Van Daele
Jan Vanderwegen
Liz Ward

Appendix 2: Strategic Planning Committee and Focus Groups

2019 Strategic Planning Committee

Sudarshan Jadcherla (Chairperson)

Jacqueline Allen

Nadine Connor

Susan Langmore

Reza Shaker

Doug Van Daele

FOCUS GROUPS	Research and Education	Membership and Marketing	Organization and Finance
Moderators	Stephanie Daniels Susan Langmore	Nadine Connor Gary McCullough	Jacqui Allen Sudarshan Jadcherla
Committee Members	Cagla Cantarcigil Bonnie Martin-Harris Tim McCullough Clarence Sasaki Michelle Troche	Arash Babaei Rinki Desai Rosemary Martino Sonja Molfenter Catriona Steele	Joan Arvedson Georgia Malandraki Nicole Rogus-Pulia Reza Shaker Catriona Steele

Appendix 3: Board of Directors, 2019-20

Position	Board Member
President <i>Program Chair</i>	Susan Langmore
President-elect <i>Abstract Review Chair</i>	Nadine Connor
Past President <i>Nominating, Strategic Planning & Awards Chair</i>	Sudarshan Jadcherla
Secretary/Treasurer <i>Sponsorship Chair</i>	Jacqueline Allen
Councilor <i>Bylaws Chair</i>	Arash Babaei
Councilor <i>Membership Chair</i>	Sebastian Doeltgen
Councilor	Nicole Rogus-Pulia
Councilor	Koichiro Matsuo
Councilor	Sonja Molfenter
Councilor-in-Training <i>Student Advisory Chair</i>	Cagla Kantarcigil
Archivist (non-voting)	Bronwyn Jones
Archivist (non-voting)	Barbara Sonies
WCPRC Co-Chairs (non-voting)	Anna Miles Rinki Varindani
Early Investigator Chair (non-voting)	Michelle Troche

Appendix 4: Badger Bay Management Staff

Executive Director Eric Ostermann	Strategic Planning Budget Bylaws
Association Director Karen Schneider	Board support Membership Nominating Student Advisory Council
Education Director Allison Tilque	Awards and Scholarship Corporate Support Meeting Program Website, Communications and Public Relations
Assistant Director Amy Schmidt	Primary point of contact (phone, email) Manages database and event registration Supports pre-meeting preparation and onsite
Office Manager Sandy Shimon	Manages accounting records Coordinates annual tax filing with tax accountant

Appendix 5: Organizational Chart

(to be attached)