



**2019 – 2022**

**Strategic Plan  
Including a Plan for Implementation**

*(Approved by the MAOPS Board of Trustees, April 2018)*



## 2019-2022 Strategic Plan

### Background

The Missouri Association of Osteopathic Physicians and Surgeons (MAOPS) was founded in 1897 and is designated by the IRS as a 501(c)(6) exempt organization. There are approximately 1,000 members representing nearly 40% of the potential members. The association has many strengths, including an organizational structure that includes affiliations with a political action committee (MOPAC), a 501 (c)(3) charitable organization (the William L. Wetzel Osteopathic Education Foundation, and district component societies. MAOPS is currently an affiliate of the American Osteopathic Association, with representation in the AOA's House of Delegates.

### Development of the 2019 – 2022 Strategic Plan

The MAOPS executive leadership team was tasked with reviewing and updating the strategic plan. The team reviewed the goals and revised them based on the current needs and environmental influences. Of chief consideration in the process was the impact of recent American Osteopathic Association policy changes, especially in the realm of continuing medical education.

### Mission and Vision Statements

Prior to 2014, the organization did not have a vision statement; and the team agreed that the mission and vision should remain the same. During the strategic plan development period, the mission of the organization was edited somewhat, but the overall intent remained as it had historically. Although the mission statement could be shortened, based on conversations with membership over last planning period, it was decided to leave them in their current stance. Previously, members had been clear that the terms “preserve,” and “distinct” remain in the mission statement. With the current national climate, the team agreed these terms may have even more relevance today than they had four years ago.

Mission	Vision
The <b>mission</b> of the Missouri Association of Osteopathic Physicians and Surgeons is to preserve and advance the distinct philosophy and practice of osteopathic medicine and advocate for the profession.	MAOPS will be the organization that osteopathic physicians think of first for expertise, education and representation.

### Strategic Focus

The team resolved to continue using the original five pillars of the strategic plan: Strengthen, Promote, Educate, Advocate and Knowledge. The team believes these pillars represent what MAOPS does well, as well as what needs to be done to meet the mission and vision. The team did update the definitions of these focus areas as follows:

- I. **Strengthen** – the profession within the state and nationally  
*MAOPS will be a leader for the osteopathic profession not only in Missouri, but nationwide. MAOPS will achieve this through leadership development programs, fostering collaborative relationships with other organizations and supporting the Association of State Osteopathic Executive Directors in their efforts to become self-sustaining. Strategic initiatives will focus on Missouri, but also on the profession as a whole, including support of, and collaboration with affiliates.*
  
- II. **Promote** – the profession within the state and nationally  
*MAOPS is situated ideally to increase awareness of osteopathic medicine among the public locally, regionally and nationally. MAOPS will enhance communication and outreach efforts to members and the public to increase awareness of the profession.*
  
- III. **Educate** – the profession through high-quality programs and accreditation.  
*MAOPS, in collaboration with the William L. Wetzel Osteopathic Education Foundation will lead efforts to provide and promote high-quality osteopathic education nationwide and will obtain ACCME accreditation for its programs, as well as seek accreditor status from the ACCME in order to engage other osteopathic organizations in providing high-quality osteopathic continuing medical education nationwide.*
  
- IV. **Advocate** – for the profession in Missouri, and regionally and nationally when appropriate.  
*MAOPS is looked to as a leader in advocacy at the private, legislative and regulatory levels, as well as at the American Osteopathic Association. MAOPS will maintain its strong presence and engagement in these arenas, and will continue to collaborate within the profession and with other relevant entities to advocate for the profession regionally and nationally.*
  
- V. **Knowledge** – base for the profession; specifically, for members.  
*MAOPS has a history of providing timely and relevant information, expertise and service to its members and will maintain the infrastructure and network to continue to do so.*

## Strategies

The following strategies are the priorities upon which the Board, committees and staff will focus and allocate resources.

### I. **Strengthen –**

- A. **Physician Leadership** – Develop the most skilled association leadership among osteopathic associations and recognize outstanding leaders. (Leadership Development Committee)
- B. **Student and Post-Graduate Leadership** – Enhance and maintain the Wetzel Scholar and Fellow Programs to develop future leaders for the profession. (Leadership Development Committee)
- C. **Campus Organizations** – Enhance and maintain the MAOPS campus chapters to ensure future physician knowledge of the function and importance of organized medicine. (COM Relationships Committee)
- D. **Colleges of Osteopathic Medicine (COMs)** – Enhance working relationships with the COMs and develop a symbiotic relationship that promotes the value of both an osteopathic education and organized osteopathic medicine to the students and alumni of Missouri COMs. (COM Relationships Committee)
- E. **Collaboration** – Develop and nurture collaborative arrangements with entities with similar missions. (Legislative and Advocacy Committee)
- F. **Staff** – Develop and maintain a highly-qualified staff vested in the mission and vision of the organization. (Finance and Audit Committee)
- G. **District Assistance** – Continue assisting districts in promoting meetings and managing finances. (Finance and Audit Committee & Education Committee)
- H. **Finances and Investments** – Maximize resources, while achieving the mission and vision. (Finance and Audit Committee)

### II. **Promote –**

- A. **Profession** – Promote the profession to the public, legislators, regulators, and private entities within the state, as well as regionally and nationally. (Communications Committee)

- B. Organization** – Promote the association’s activities and mission to members, potential members, colleges of osteopathic medicine and other state and national associations. (Communications Committee)
- C. Members** – Increase awareness of member achievements to the public and profession and enhance the MAOPS Awards program to better identify and recognize Missouri’s most outstanding osteopathic physicians and advocates. (Communications Committee)
- D. Osteopathic Education** – Increase awareness of osteopathic CME opportunities in Missouri and nationwide through a variety of marketing techniques, including print, electronic, social media and by utilizing and enhancing the application “CMEprn” and the CME Consortium database. (Communications Committee)
- E. Information Dissemination** – Develop appropriate informational resources and ensure effective delivery to members, the profession and the public. (Communications Committee)

### III. **Educate –**

- A. Accreditation** – Obtain ACCME accreditation and become an accreditor for other organizations, while maintaining AOA and AAFP accreditation status for current programs, as long as each remains relevant. (Education Committee)
- B. Live CME** – Maintain the Midwest Osteopathic Annual Convention and pursue opportunities to co-brand and/or co-market other osteopathic programs nationwide. Weekend CME events will be implemented around the state, in partnership with local districts, to provide access to osteopathic education. (Education Committee and Convention Committee)
- C. On-demand CME** – Enhance and diversify educational offerings available on DO-CME (or similar platform), including assisting osteopathic affiliates in development of programs for the platform. (Education Committee)
- D. Specialty CME** – Expand educational opportunities for targeted specialties, working with specialty colleges to provide offerings at the Midwest Osteopathic Annual Conference. (Education Committee)
- E. Student and Residents** – Develop pertinent educational offerings for student and post-graduate members. (Education Committee and Young Leaders Committee)

- F. CME Consortium** – Utilize the CME Consortium to promote MAOPS educational programs to a broader audience, as well as to encourage Missouri physicians to pursue osteopathic education nationally. (Convention Committee)

IV. **Advocate –**

- A. Legislative Influence** – Ensure profession representation at the state Capitol and Executive branch. (Legislative and Advocacy Committee)
- B. Regulatory Influence** – Ensure profession representation at the regulatory level. (Legislative and Advocacy Committee)
- C. Collaboration** – Establish collaborative teams with like-minded organizations to address issues at the local, state, federal levels, as well as with private entities. (Legislative and Advocacy Committee)
- D. American Osteopathic Association** – Represent and advocate for osteopathic physicians and patients, as well as the MAOPS mission, at the AOA Board of Trustees, House of Delegates and appropriate committees. (Executive Committee, Board of Trustees, and MAOPS AOA Delegates)
- E. Physician Health** – Maintain and enhance the MAOPS Physician and Health Provider Wellness Program for physicians and their associates with issues affecting their ability to effectively provide care for the patients of Missouri. (Physician Health Committee)

V. **Knowledge –**

- A. Professional Issues** – assist individual members with professional issues. (Executive Committee)
- B. Resources** - assist members with the development of, or referral to, pertinent resources, such as contract review & physician negotiation. (Communications Committee, Executive Committee)

## **Implementation of the Strategic Plan**

Implementation of the strategic plan will be through a partnership between staff and volunteer leaders. It is essential that volunteer leaders take an active role in the implementation to ensure member buy-in and relevance. Similarly, staff must also be mission focused through direct involvement with the strategic plan. Each staff member, as well as volunteer, must believe their contribution is making a difference in achieving association goals. If either is missing, the strategic plan will suffer.

To implement the strategic plan, it is important to ensure the alignment of volunteer committees and staff. Lack of alignment limits the infrastructure to successfully accomplish the goals. Volunteers are essential to ensure the voice of the member is heard. Proper staffing is vital to ensure the directives of the volunteers can be carried out. It is important to note that, although volunteers may have taken a more active role in implementing their ideas in the past, this is no longer the case. Volunteers have limited time to devote to the organization, and while they are eager to provide higher level, big picture ideas and plans, they are no longer willing/able to provide the “labor” necessary for proper implementation, which means this must fall to the organization’s staff. Therefore, it is essential that staffing match the needs of the strategic plan. It is also vital that the organization stay focused on the strategic plan and not suffer “mission drift.”

## **Committee Alignment**

During the last strategic planning process, MAOPS significantly streamlined committees and functions, relying more on fast action teams that provided focused attention to policy issues. This has resulted in a more efficient use of the organization’s volunteer and staff time.

Implementation of the above strategic initiatives requires the recommendation of the following standing committees:

- I. Convention Committee
- II. COM & Student Relationships Committee
- III. Communications Committee
- IV. Education Committee
- V. Executive Committee
- VI. Finance & Audit Committee
- VII. Leadership Development Committee
- VIII. Legislative & Advocacy Committee
- IX. Membership Task Force
- X. Missouri Osteopathic Political Action Committee
- XI. Physician Health Committee
- XII. Young Leaders Committee

Of these standing committees, several changes from the previous cycle are recommended. First, the separation of the Education from the Convention Committee. While the two may often work closely, separation is recommended due to the different emphasis that the organization will be placing on education in the future. The Education Committee will focus on accreditation standards, achieving ACCME accreditor status, and the educational programs at conferences and meetings. The Convention Committee will focus on the non-educational functions of the annual

convention. The Board has already approved changes to the chairmanship process for the Convention Committee for these committees.

The second recommended change is the re-establishment of a “Young Physicians” Committee, but renamed the “Young Leaders Committee.” MAOPS is fortunate to have a group of engaged young professionals who wish to maintain their ability to function as a team, but in a more structured environment. Due to the emphasis on students and post-graduates in the strategic plan, it is vital that the input of these two groups be heard. However, it is also important that the committee have representation from young physicians who have experience in the practice of medicine in order to provide insight that may be missing were only students and post-graduates included.

Third, a simple change to the name of the Legislative Committee to the “Legislative and Advocacy Committee.” The committee needs to focus on the regulatory process as well in order to best serve members.

Fourth, the Addition of a “COM Relationships Committee” is suggested. With an emphasis on relationships with COMs and established MAOPS chapters on each of the three campus, it is essential that staff have qualified assistance and guidance in pursuit of this goal. Members who have strong connections to the COMs are essential to developing and maintaining strong ties between the COMS and MAOPS. Members with a strong interest in students are essential to the success of our student chapters.

Finally, with the strong emphasis on “Promotion,” and a staff person dedicated to communications, it is important to have an advisory panel that can help generate ideas and direct staff as to what type of communication may be most beneficial to our members.

Below are detailed job descriptions for each of the recommended committees.

### **Convention Committee**

The Convention Committee will be chaired by the volunteer leader identified by the Board to begin succession to the Presidency of MAOPS. They will serve a 1-year term before succeeding to 2<sup>nd</sup> Vice President. Job performance will indicate to the Board the candidate’s ability to be considered for future advancement in organizational leadership with MAOPS.

The staff liaison for the committee will be the Associate Executive Director or his/her designee.

The Convention Committee will be responsible for:

1. Development and implementation of the entire annual conference and other CME events, including: identification of venue, overall agenda/schedule development, exhibition hall activities (including recruitment of exhibitors), sponsor recruitment, marketing and promotion, budgeting, and activities associated with the annual membership meeting.
2. Assist in the implementation of the conferences including serving as moderators and greeting attendees, speakers, exhibitors, sponsors and VIP’s.
3. Reviewing and enhancing the CMEprn app.

The committee will meet once at the annual convention, during a weekend retreat at the upcoming convention site, and as necessary throughout the year.

### **COM Relationships Committee**

The COM Relationships Committee will be chaired by a member selected by the President and approved by the Board of Trustees. The chair and the committee members should be selected based on: 1) connections to the COMs, 2) ability to establish and maintain relationships with appropriate COM leaders, 3) ability and desire to be present for COM events, both with administration and students. The committee should be composed of alumni from each school. The committee will meet 3-4 times per year to ensure progress and continuity of projects.

The staff liaison for the COM Relationships Committee will be the Executive Director or his/her designee.

The COM Relationships Committee shall be responsible for the following:

1. Develop and implement a plan of action that will engage COM leadership and students in MAOPS through on- and off-campus activities.
2. Serve as points of contact and off-campus advisors for the student chapters of MAOPS on each campus.
3. Ensuring maximum COM faculty participation in MAOPS membership and the annual convention.

### **Communications Committee**

The Communications Committee will be chaired by a volunteer leader selected annually by the President and approved by the Board of Trustees. The chair shall have an interest in social media, editing and/or marketing. The committee will meet at least twice per year to review and update the association's communications strategy.

The staff liaison for the Communications Committee shall be the Communications Coordinator.

The committee shall be responsible for:

- 1) Developing, implementing and reviewing a communications strategy for the organization
- 2) Annually reviewing publications, including the Prognosis, for effectiveness and recommending necessary changes.
- 3) Submitting content for the Prognosis and other publications.
- 4) Reviewing design and content of publications for staff and providing prompt feedback.
- 5) Reviewing, updating and maintaining the MAOPS website.
- 6) Reviewing and evaluating communications technologies and ensuring MAOPS is using the most effective technologies possible.

## **Education Committee**

The Education Committee will be chaired by an established MAOPS leader with a background in educational program development or a similar skill set. The appointment will be for a minimum of three years; longer if possible to maintain continuity.

The staff liaison for the Education Committee will be the Associate Executive Director.

The Education Committee shall be responsible for the following:

1. Obtaining initial ACCME Accreditation,
2. Maintaining AOA and AAFP accreditation status for MAOPS educational programs,
3. Developing and enforcing educational policies based on ACCME, AOA, AAFP and MAOPS requirements,
4. Developing educational curriculum for MAOPS sponsored CME events following necessary AOA, ACCME and AAFP guidelines,
5. Rigorously maintaining the independence of all educational activities from commercial influence,
6. Identifying and recruiting qualified speakers for MAOPS curricula,
7. Assisting staff in contacting potential speakers, identifying technology needs and other aspects of the educational process,
8. Reviewing programs for adherence to accreditation standards,
9. Serving as moderators during educational events; and,
10. Other duties associated with successful development implementation of educational events and accreditation.

## **Executive Committee**

The Executive Committee is established in the bylaws with the specific task of transacting emergency business between meetings of the Board of Trustees. The committee is chaired by the MAOPS President and consists of the President-elect, 1<sup>st</sup> and 2<sup>nd</sup> Vice Presidents, Immediate Past-President and chairs of the Finance and Audit Committee and Legislative Committee. Historically, the President has also had the option to appoint additional members, as he/she sees fit, to assist him/her in fulfilling the duties of the office.

The Executive Director shall serve as the staff committee liaison.

In addition to transacting emergency business of the association, the Executive Committee will also review the strategic plan of the association, serve as the Ethics Committee for the Association, and make recommendations to the Board on membership dues and assessments.

### **Finance & Audit Committee**

The chair of the Finance and Audit Committee will be appointed annually by the President. Longer service is recommended to maintain continuity. Members of this committee are selected based on their knowledge of MAOPS and the Foundation over time; therefore, historical perspective and strategic knowledge are necessary. Members typically serve for extended periods of time.

The Associate Executive Director shall serve as the staff committee liaison.

The Finance and Audit committee is responsible for ensuring the following:

1. Developing and adhering to an annual budget for both MAOPS and the Wetzel Foundation, ensuring that it meets the mission and strategic plan of the organization,
2. Annually reviewing and making recommendations on association investments,
3. Reviewing and approving the annual audits of MAOPS and the Wetzel Foundation,
4. Annual performance review of the Executive and Associate Executive Directors,
5. Review and/or development of necessary financial policies for the association and foundation; and,
6. Emergency approval of expenditure of non-budgeted needs of the association and/or Foundation.

### **Leadership Development Committee**

The Leadership Development Committee (LDC) is chaired by the Immediate Past President. Committee members will be composed of a minimum of five other osteopathic physicians as outlined in policy. Committee members are expected to serve a minimum of a 3-year term to preserve continuity and institutional knowledge.

The committee's staff liaison shall be the Assistant to the Executive Director

The duties of the LDC are as follows:

1. Formally nominate the officers and AOA delegates of MAOPS each year,
2. Develop the slate of candidates for MAOPS' at-large Board member election annually,
3. Review and develop leadership development programs including the Wetzel Scholar and Fellow programs,
4. Make recommendations to the Board regarding Wetzel Scholar and Fellow candidates,
5. Identify potential future leaders of the organization, including vetting potential student Trustees,
6. Serve as mentors to Wetzel Scholars and Fellows,
7. Review award nominations and make recommendations to the Board of Trustees.
8. Identify needed resources to achieve strategic goals; and,

9. Development and/or review of policy associated with any of its duties.

### **Legislative & Advocacy Committee**

The Legislative and Advocacy Committee chair is appointed by the President annually. Committee members are chosen by the chair based on experience and interest in the legislative and regulatory process.

The staff liaison for the committee is the Executive Director or his/her designee.

The duties of the Legislative and Advocacy Committee include:

1. Development and review of MAOPS' Legislative Agenda,
2. Identification and development of MAOPS external policy,
3. Representation of the organization at legislative and regulatory events and meetings,
4. Review of proposed legislation and regulation and preparation of comments to appropriate entities,
5. Development, review and implementation of the MAOPS D.O.c.-A-Day program; and,
6. Periodically reviewing the performance of the contracted lobbyist.

### **Membership Task Force**

The Membership Task Force was established by the Board of Trustees in April 2018 to develop unique strategies to assist in growing MAOPS membership as well as improving retention of members. The chair is appointed by the President and approved by the Board of Trustees and shall remain as such until the Task Force disbands.

The staff liaison for the task force will be the Associate Executive Director.

The duties of the task force include:

- 1) Reviewing membership trends and data
- 2) Developing unique strategies to improve membership based on analysis of trends and data
- 3) Assisting affiliates in engaging in membership recruitment and retention activities.

### **Missouri Osteopathic Political Action Committee**

The Missouri Osteopathic Political Action Committee is chaired by an appointee of the MAOPS President. Members consist of 6-10 MOPAC Capitol Club members.

The staff liaison for the MOPAC will be the Assistant to the Executive Director or his/her designee.

The duties of the MOPAC shall be to:

1. Develop an annual expense and revenue budget,
2. Monitor MOPAC financial accounts,
3. Raise funds to support political candidates for office in the state of Missouri,
4. Determine to whom MOPAC funds should be distributed,
5. Develop, implement and host the annual Capitol Club recognition event at the Midwest Osteopathic Annual Convention,
6. Ensure appropriate recognition of Capitol Club members,
7. Participate in and/or host political fundraisers; and,
8. Deliver donations to political candidates and inform them of positions on relevant issues.

### **Physician Health Committee**

The MAOPS Physician Health Committee shall be chaired by an appointee of the President. The committee shall be appointed annually by the President and shall consist of 4-6 members interested in physician health, the medical director of the program, and the director of the program from Capital Region Medical Center.

The staff liaison for the Physician Health Committee shall be the Assistant to the Executive Director.

The duties of the Physician Health Committee shall be to:

1. Develop policy for the MAOPS Physician and Health Professional Wellness Program (PHP),
2. Raise funds to support the PHP,
3. Review participant progress in the PHP; and,
4. Promote the PHP.

### **Young Leaders Committee**

The Young Leaders Committee shall be chaired by a Wetzel Scholar or Fellow or Candidate as designated annually by the MAOPS President. The committee shall consist of 6-8 additional members meeting the following criteria: a student, post-graduate or physician in practice ten years or less. Current Wetzel Scholar and Fellow Candidates are required to actively serve on this committee.

The staff liaison for the Young Leaders Committee shall be the Assistant to the Executive Director.

The duties of the Young Leaders Committee include:

1. Develop and implement appropriate educational opportunities for Young Leaders,
2. Develop the agenda for, and host, an annual meeting for young leaders,
3. Develop and implement appropriate social and networking events for Young Leaders,
4. Mentor student leaders of the MAOPS campus chapters in Kansas City, Joplin, and Kirksville,
5. Develop and propose policy pertinent to young leaders and physicians,
6. Develop necessary fast action teams to address issues of the committee,
7. Assist the Executive Committee and Board of Trustees in identifying the best candidates for MAOPS' student and postgraduate Trustee positions, as well as Wetzel Scholar and Fellow candidates,
8. Identify and recommend to the MAOPS Board of Trustees potential young leaders to attend the AOA House of Delegates; and,
9. Make recommendations to the President for young leader representation on MAOPS committees and fast action teams.

### **Staff Alignment**

In order to implement the strategic plan, the following permanent staff needs have been identified.

- **Executive Director & Assistant to the Executive Director**
  - Resident Program Outreach
  - Affiliate Outreach
  - COM Relations
  - Leadership Development
  - CMEprn and CME Consortium
  - Governance including internal policy
  - Advocacy
  - MOPAC
  - MOMA Day
  - AOSED
  - Annual Convention Responsibilities
- **Assistant to the Executive Director**
  - Office Management
  - CMEprn (including platform enhancements)
  - Committee Liaison as appointed
    - AOA House of Delegates
    - Physician Health
    - Leadership Development
    - Board of Trustees including elections and annual membership meeting
  - Online CME
  - MOMA Day
  - District Assistance
  - Wetzel Foundation

- PHP Solicit
    - Awards Program (LDC)
    - Scholar and Fellow Programs
    - Wetzel Foundation Fundraising
  - D.O.c.-A-Day Program administration
  - Annual convention responsibilities including special events as directed by Associate Executive Director
  - Development and Management of staff and volunteer calendar
  - All meeting agendas, announcements, and other business meeting related tasks
  - Supervision of Administrative Assistant 1
- **Administrative Assistant 1**
  - Assist the Assistant to the Executive Director
  - Share receptionist duties with Administrative Assistant 2
- **Associate Executive Director &**
  - General Accounting Duties for Wetzel, MAOPS and MOPAC
  - Financial Planning, Analysis and Oversight
    - Finance and Audit Committee Liaison
  - Membership
    - Task Force Liaison
  - ACCME Accreditation
  - Education Committee Liaison
  - All Database Management
  - Human Resources
  - Supervision of Meeting Planner
  - Annual Convention Responsibilities
- **Administrative Assistant 2**
  - Assist Associate Executive Director and meeting planner in administrative duties
  - Share receptionist duties with Administrative Assistant 1
- **Meeting Planner**
  - General Convention Planning including:
    - Exhibit Hall
    - Registration
    - BEO's
    - Site Visits
    - Initial Contract Negotiation
  - Convention Committee Liaison
  - Planning of all association meetings: district affiliates, regional, CME, etc.
  - Annual Convention Responsibilities
- **Communications Coordinator**

- All communications (print and electronic), marketing and promotion including CMEprn and CME Consortium
  - Advertising and sponsorships including convention exhibit hall
  - Website update and maintenance
  - Social media
  - Annual Membership Solicit
  - COM Chapter Liaison
  - Young Leaders Committee Liaison
  - Annual Convention Responsibilities
- **Additionally, several outsourced needs have been identified:**
    - Annual Audit
    - Design and Editing of the Prognosis Newsletter and other publications/promotional materials
    - Lobbyist
    - Temporary Help for large mailings (local high school athletic teams)
    - Technology/Security
    - Building Cleaning, yard and general maintenance
    - ACCME Accreditation Consultant
    - Printer and Mailing Service

### Supervision Schedule

#### Executive Director

- Assistant to the Executive Director
  - Administrative Assistant 1
  - Mailing Assistance
  - Building cleaning, yard and maintenance
- Communications Coordinator
  - Design and editing of newsletters and publications
  - Printer and Mailing Service
- Lobbyist

#### Associate Executive Director

- Meeting Planner
- Administrative Assistant 2
  - Technology/Security Vendors
- Outside Auditors
- ACCME Accreditation Consultant