



Strategic Planning Report

Prepared by Joining Vision and Action (JVA)

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For The Osteopathic Cranial Academy (OCA)

www.cranialacademy.org

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“To teach, advocate and advance osteopathy, including osteopathy in the cranial field, as envisioned by Andrew Taylor Still, MD and William Garner Sutherland, DO.”

OSTEOPATHIC CRANIAL ACADEMY MISSION

INTRODUCTION

In early December 2017, the board of directors and the executive director of The Osteopathic Cranial Academy (OCA) gathered in Denver for a weekend planning retreat to:

- Create a shared vision of the future
- Focus future directions and activities
- Develop a clear road map for moving forward, with a detailed implementation plan and commitment to achieving focused goals

As a follow-up to a planning retreat OCA conducted in 2013, Joining Vision and Action's (JVA) strategic business/planning group worked in partnership with OCA leadership to create an agenda that would review progress and implementation of the 2013 plan, examine trends and solicit member feedback for the organization via the November 2017 member and board survey, and create a strategic framework for 2018 and beyond.

This report captures results from the retreat's planning efforts and includes a specific and focused implementation plan for moving toward identified goals and strategies.

The board of directors was focused in its efforts to respond to key themes identified by organization members, and in its desire to increase the impact and reach of the Osteopathic Cranial Academy.

Turn the waters of life loose at the brain, remove all hindrances and the work will be done, and give us the eternal legacy, longevity.

—A. T. Still, MD, DO, Philosophy of Osteopathy

PARTICIPANTS

Board of Directors

- James W. Binkerd, DO; president (Vallejo, CA)
- Dennis Burke, DO (Middletown, NY)
- Ali M. Carine, DO (Arlington, OH)
- Theresa A. Cyr, DO (San Diego, CA)
- Maria Gentile, DO (Denver, CO)
- Matthew A. Gilmartin, MD (San Francisco, CA)
- Andrew M. Goldman, DO (Sharon, CT)
- Annette E. Hulse, DO (Santa Cruz, CA)
- Thomas A. Moorcroft, DO; president-elect (Berlin, CT)
- Daniel A. Shadoan, DO (San Francisco, CA)

Staff

- Sydney N. Dunn, executive director

JVA's co-facilitators

- Janine Vanderburg, JVA president/CEO
- Amber Giauque Callender, consultant

WHY OUR WORK MATTERS

The board engaged in a lively discussion about why the work of the OCA matters and why each member is committed to the organization's growth and increased reach. Board members described the OCA's value proposition in the following ways:

- The practice of cranial osteopathy can change the health of individuals and our country
- The organization is one of very few that can keep a strong focus on members and patients and on the potency and intelligence of the work
- The OCA can work to preserve the core of osteopathy work
- The OCA is a critical forum for lifelong learning, with lifelong growth opportunities for practitioners, including education and advocacy
- The OCA is a space where osteopathy can be celebrated among practitioners

VISION FOR THE FUTURE

During the 2013 OCA retreat, board members developed the following vision of success. The board of directors and membership continue to support this vision, with an eye toward growth and sustainability.

If OCA is successful in its work, **we will have accomplished the following:**

In the **Medical Field**

- A transformation of the present medical paradigm, replaced by holistic, spiritual consciousness
- Osteopathic paradigm will have perfused all of medicine.
- A raised consciousness for all of humanity.
- Hands-on practice will be central to medicine.

In **Medical Education**

- All graduates will understand and learn to practice osteopathy.
- Students will desire to learn osteopathy.
- Curricula will be centrally osteopathic.

In the **Public**

- Patients will consider osteopathic manipulative medicine first.

- Patients will understand the difference between holistic healing and “fixing.”

OCA Members

- OCA will be succeeded by the American Osteopathic Association (AOA).
- All M.D.s will understand the importance of osteopathic medicine.
- All D.O.s will be members of OCA.

Retreat participants engaged in a brief analysis of the 2013 plan within the following five key strategic initiatives:

- Engaging members
- Growing the pipeline of osteopaths
- Supporting practitioners
- Telling the story
- Advocating for the profession and on behalf of members

Board members believe a surprising number of 2013 goals were accomplished (for example, getting a resident on the board for increased visibility, hosting a welcome dinner for students at the annual conference), and found implementation timelines to be very useful. A lack of focus on practice management was raised as an area for implementation improvement.

To ensure success in moving forward on this plan, board members generated a set of guiding principles for setting goals, implementing strategies and establishing time frames. (*See Appendix A.*)

PERCEPTIONS OF OCA

In advance of the retreat, JVA issued an online survey to over 3,300 individuals, and 500 responded. This survey was sent to members, former members and nonmembers, with 64% of respondents identified as regular members.

The survey was developed to better understand past, present and potential OCA members' satisfaction with and commitment to the OCA, their perception of OCA membership value, their expectations of membership and their perceptions of the OCA itself. The information collected was shared with board members to inform the OCA's strategic planning.

Feedback gathered from board, staff and membership reveals top areas of agreement:

Strengths

- The continuing education opportunities provided by the OCA are among its greatest assets.
- Respondents appreciate the support and promotion of the field that the OCA provides.

Areas of Opportunity

- Opportunities and services provided by the OCA (e.g., mentoring, online resources, additional training opportunities) need to improve.
- The OCA needs to become more welcoming to those who are qualified (i.e., the OCA is perceived as cliquey/exclusive).
- Use of technology could improve.
- Membership needs to increase.

Retreat participants reiterated their understanding of the survey feedback and vowed to be a relevant, responsive organization committed to teaching, advocating and advancing osteopathy. They noted a continued expansion in schooling to meet primary care needs, but expressed deep concern about properly supported and trained faculty to meet the specific needs of osteopathic learning.

Board members realize the organization cannot change the trends itself, but noted that it has a unique opportunity to strategically meet the challenges of the profession and the training pathway.

TRENDS

In addition to perceptions about the OCA itself, the survey shed light into key trends affecting the organization and the profession:

- The transition to a single accreditation system (i.e., the Accreditation Council for Graduate Medical Education [ACGME] with the AOA and the American Association of Colleges of Osteopathic Medicine [AACOM] by July 2020)
- The increasing DO student population without similarly increasing opportunities to learn about osteopathy in the cranial field (OCF)
- The increase of non-DOs providing perceived-similar services
- The increase in patient interest and awareness in integrated approaches to medicine
- The political environment/healthcare uncertainty

THEORY OF CHANGE

To respond to the feedback collected via online surveys and trend analysis, and in keeping with tightly held ideals on the education and advocacy of osteopathy, retreat participants suggested that the OCA can increase its reach and impact by:

- Increasing access to membership through alternative pathways and a focus on students
- Improving member engagement through more effective member communication and benefits and through attention to faculty and training needs
- Building bridges with and making stronger connections to sister organizations

GOALS AND STRATEGIES

Using the overarching Theory of Change above, the board participants spent the majority of the retreat action planning. Six major goals and related objectives are listed below, with specific implementation tasks and timelines in the implementation plan section of this document.

Goal 1. Examine an alternative pathway to membership through a nonapproved introductory course and testing/exam given by existing faculty (who have not taught the course).

This goal would create a pathway to membership outside of successful completion of the current, OCA-delivered 40-hour introductory course. It requires extensive committee engagement, with the following guidance for consideration by the committee:

- The tension between approved courses and the examination of individual competency must be explored.
- The Introductory Course Committee must discuss course criteria and whether the alternative pathway equals an introductory course as a prerequisite for intermediate coursework.
- Eligible membership candidates must demonstrate completion of 40-hour course, and criteria for the 40-hour course would be published.
- Examination of individual competency would take place where and when convenient for the OCA, and would be by existing OCA faculty (not faculty who ran the course for the candidate).

- Membership should receive communication around this response to a survey suggestion, and members should be invited to participate on committees.

Goal 2. Expand OCA's online presence and strategy.

Per strong recommendations from the member survey, the OCA board will expand promotional video offerings and begin to build a stronger online presence and resource capacity.

This goal features a pilot for proof of concept with small, promotional videos, including these:

- Sutherland Memorial Lecture (June 16, 2018)
- History Lecture (February 10 and June 9, 2018)

Board members themselves will spend 2017 training and exploring use of video to make more direct contact with membership and to share their stories of how they came to practice osteopathy.

Goal 3. Expand training and faculty support.

To grow and sustain the OCA as an organization, it will expand training and faculty supports, including the following:

- Consideration of a partnership with The Sutherland Cranial Teaching Foundation (SCTF) for a “teach the teachers” course to strengthen practitioner training. It would target residents, resident directors and College of Medicine (COM) faculty. (If partnership is not possible, OCA Continuing Studies Committee could consider creation of a course.)
- With input from a task force (to be created by the OCA), pilot a regional training strategy, with Ohio and California as potential areas of focus.
- Create scholarship funding and recipient criteria for intermediate courses targeting residents and members in their first seven years of practice for a September 2018 course.

Goal 4. Enhance member communication and engagement.

As is true with all organizations, communication and engagement with membership is a crucial step toward growth and sustainability. The OCA will enhance current communication and engagement, with key activities including the following:

- Assignment of additional duties to the Membership Committee
- Creation of a calendar for periodic member communication
 - 1-2 communications per month
 - One topic per email

- Use of visuals and graphics
- Highlighting courses, new books, events, calls to action
- Targeting audiences for communications and recruitment, including mid-career DOs and MDs

Goal 5. Enhance and target student support.

As a means for increasing reach and influence with students, the OCA will focus specific attention on enhancing student support. The following activities will be included:

- Potential creation of a Student Education Subcommittee, with involvement from the Physician-in-Training Committee
- Exploration of ways to target and support students who are likely to encourage their classmates to show up to courses and become members
- Exploration of student programs and brief courses, including a weekend introductory course
- Exploration of a one- to three-hour monthly or bimonthly in-office Saturday study group with students (each board member and OCA faculty)—encouraging participation from senior membership at large
 - Consider existing resources for making this possible (online videos, etc.)
 - Ask students what would make interesting and worthwhile topics
 - Target “thin” membership regions for study groups

Goal 6. Create a stronger bridge between OCA and sister organizations.

The OCA would like to create a stronger bridge and connection to sister organizations, while working to delineate how OCA is different from other organizations in scope and purpose.

In bridging with other organizations, OCA would like to:

- Recognize and highlight the OCA’s role as a political/advocacy organization
- Explain why those belonging to sister organizations would also be interested in the OCA

Key strategies under this goal include the following:

- Contact sister organizations to discuss partnership, and ways to be of service to one another

- Develop a common, coordinated pathway narrative or chart to include various courses taught by sister organizations, and post this pathway on the OCA website
- Highlight more prominently on the OCA website what makes OCA unique, including its charter and mission statement
- Communicate with sister organizations about OCA offerings, including any emerging alternative pathways to membership or trainings

IMPLEMENTATION

Retreat participants spent the majority of their planning efforts on specific, actionable items for implementation by the OCA. A detailed implementation plan for goals and strategies for 2018 and beyond can be found in a separately prepared report in Excel.

BACKBURNER: IDEAS AND THOUGHTS FOR LATER

OCA retreat participants generated an expansive list of ideas around goal topics. Ideas that did not become specific actions for implementation for 2018 are listed below and should be used in future action planning and reflection.

Additional Pathway to Membership

- Should the board approve an additional pathway to membership in October 2018, action steps for communication about this pathway should be mapped out for the remainder of 2018 and 2019, and should include consideration for sister organizations, members, faculty and students.
- Explore “less than full membership” concept:
 - Ph.D. members
 - “Affiliate members”—potential for course audit support
 - COM basic science faculty
 - Cost premium

Expanding OCA Online Presence

- Consider need for hiring, training and management of media staff

- Retrieve already-completed (and recorded) lectures to make available as a member benefit, and consider potential revenue models for distribution
- Consider targeting interactive spaces for recording videos, capturing students, patients, colleagues, members
- Create a more substantial library of resources, including:
 - Member welcomes
 - Pre-introductory course material
 - Turn-key process for uploading patient and student testimonials (with consent documents)
 - Instructional videos (how to be a board member, committee chairs, conference directors, etc.)
 - More formal, scripted content
 - Board member Fellow of the Cranial Academy (FCA)
 - Mentor interviews
- Consider which member activities can be attended online. Examine financial model and means for expanded learning.

Expanding Training and Faculty Supports

- Examine training as a continuum heading toward being “senior faculty”
- Explore periodic auditing of basic courses for current OCA faculty, including exploration of mechanisms for auditing intermediate courses
- Explore creation of regional courses for COM faculty
- Explore ways to “resurrect” knowledge of Dr. Still’s work
- Explore creation of guidelines on how to become qualified to be faculty in training
- Explore development of concrete, recurring, continuing medical education (CME) for faculty development (and develop reputation)
- Explore ways to leverage annual conference for training
- Explore more active involvement in helping COM faculty develop (practice management, etc.) with an opportunity to influence and mentor
- Explore more active involvement with residency directors (how to prepare for osteopath practice)
- Explore stronger directive for course directors to bring in participants

Membership Communication and Engagement (likely items for Membership Committee to consider)

- Inquire of and capture from membership what or who was the most influential factor in their growth as an osteopath, and consider sharing this information either in writing or via online videos
- Explore ways to ensure surveys have meaningful follow-up with actionable items
- Explore enhancements to practice management support
- Coordinate with efforts described in online resource management to ensure strong communication to members about available supports. Include a learning and sharing center

Student Support

- Promote courses to students via above and word of mouth, social media
- Encourage students to attend basic course, annual conference and other courses
- Look at potential student overlaps (integrative/functional medicine)
- Focus on pipeline of membership—preventing attrition (going from introductory to other courses)

ADDITIONAL RECOMMENDATIONS

As experienced facilitators with decades of experience working with organizations in business and planning, we offer brief additional recommendations for consideration below.

Task Force Creation

- Keep the task force membership to a manageable size (10-12 members maximum)
- Establish leadership for the task force, and convey clear directions and guidance
- Create a clear, concise mission for the task force, including clear roles and responsibilities for general membership, a clear timeline for work, and any resources that will be made available for participants
- Ensure participants have enough time to fully participate, according to outlined expectations

- Consider professional facilitation for the task force itself, including conducting research on the creation of a report for board consideration

Managing Social Media

One of the key guiding principles that retreat participants outlined was to outsource tasks where needed. We strongly recommend using outside professional support for social media management. This professional support could range from planning to implementation of specific activities, and expertise can help save time and money for OCA in the long term.

CLOSING

The OCA Board of Directors is a dynamic, committed group of osteopaths who believe that the world can be changed through their practice. JVA is grateful for the time spent with this group and is available for ongoing support and consultation as the organization expands in numbers and influence. Being both bold and achievable, the goals and strategies appear true to the organization's mission, and JVA is excited to learn about implementation progress.

THANK YOU!

APPENDIX A: RETREAT GUIDING PRINCIPLES

Prior to engaging in action planning, retreat participants identified guiding principles for setting strategic goals and time frames. These included the following:

- Identifying areas for outsourcing, with a need to consider budget and tasks that are well defined and supported by someone within the OCA
- Identifying obstacles to goals, including: time needed for exploration and implementation, and clear motivations and task definitions for goal consideration. Goals should be: achievable, actionable and measurable, with a clear OCA lead
- Identifying ways to promote purpose for individuals at all levels of the organization
- Guarding that growth never compromises the integrity of the education and practices promoted by the OCA, including faculty to student ratios in any hands-on learning opportunity (1:4). Ethical standards of members and faculty should never be compromised
- Leveraging of existing resources, including membership presence at schools
- Ensuring the strategic plan is transmitted to OCA leadership, membership and sister organizations
- Ensuring that goals and strategies for growth have no direct conflict with any sister organizations

APPENDIX B: IMPLEMENTATION PLAN

A separate implementation plan has been developed in Excel.