

Strategy for the Future

Michigan Society

of

Hematology & Oncology

September 23, 2010

Boyne Mountain Resort

Facilitated by:

Donnelly K. Eurich, CAE, CMP

September, 2010

The Board of Directors of the Michigan Society of Hematology and Oncology, (MSHO) met on September 23, 2010 to plot a strategy for the future of the organization. The Board has defined the mission and goals of the MSHO along with very specific action steps to implement those goals. It is important to emphasize that any long range plan should be viewed only as a first step in an ongoing planning process. This is particularly true in an environment like the medical field, and these disciplines in particular, where change is occurring at a rapid pace and assumptions we make today are subject to change through the political and regulatory processes, research or changing economic cycles.

By giving management specific goals and objectives to reach, the organization's future can be plotted and controlled and resources can be utilized in areas best suited to giving stakeholders maximum value from the relationship.

This strategic plan is not a rule book to be followed to the letter, but is a flexible guide for pursuing a desired future for MSHO. Each year, this strategic plan should be reviewed and modified where necessary to provide a targeted, current road map for management and the Board of Directors to use to protect the organization's financial stability, manage its resources effectively and meet the ever changing needs of their member physicians and the patient community they serve.

Sincerely,

Donn Eurich

Donnelly K. Eurich, CAE, CMP
President

The Strategic Planning Process

A strategic planning session consists of a highly defined flow of events which is designed to direct the committee through the strategic planning process in an orderly fashion. The facilitator works closely with management prior to the meeting, to ensure that all critical topics are covered, and that each committee member has adequate resources to prepare for the day's event. Following the welcome and self introductions, the session will flow along these lines.

Strategic Planning Overview - The facilitator will provide an overview of the strategic planning process, including what is expected of each committee member, and the goals and objectives which are to be met during this day's session. The session is intended to be kept informal and input from every member is valued. Committee members will be asked to use examples from their own interaction with the association, and share their honest feelings about their experiences.

Mission Statement development - The committee will spend a portion of the morning developing a mission statement for the association or reviewing and updating the current mission statement. This process is designed to challenge committee members to define precisely why the association exists and determine what it intends to provide to its membership and the community. The mission statement should be expressed in broad terms, and be process oriented, not goal oriented. It is the cornerstone of all activities which follow for the remainder of the strategic planning session.

Member Input - Following the successful development of a mission statement, the committee should review the most recent member surveyor focus group results which have been compiled. The purpose of this exercise is to bring input to the table from those members who have opinions about the association's current practices and future direction, but are unable to participate in the strategic planning process. By utilizing focus group results or a member survey, each membership faction is assured that it has a voice in the strategic planning process, and as CEO or a board member you are assured that your strategic plan properly represents your entire membership. The committee also reviews the current financial status of the association. If necessary, the committee reviews several financial ratios to isolate areas in need of improvement.

Organizational Analysis - After reviewing current membership opinions and attitudes, the committee will undergo a SWOT analysis which consists of reviewing the association's Strengths, Weaknesses, Opportunities and Threats. The committee will be asked to review the financial strength of the association, educational offerings, member services, the image of the association, the attitude and professionalism of management and staff, as well as provide an evaluation of the future environment in which the association must operate. This committee exercise compliments the information provided by the member surveyor focus group sessions and sets the stage for the next planning step.

The Strategic Planning Process continued

Profile of the "Ideal" Organization - Once the SWOT analysis is complete, the committee will be asked to generate a "wish list" of services, or other features they would like to see in the ideal association. This exercise is known as "futuring" and permits each committee member to literally reinvent the organization by communicating what services and other features they desire in an ideal situation.

Prioritization, Implementation, Measurement & Cost - Following the development of the "wish list", the committee will be asked to prioritize the wish list into organizational goals and objectives which should be met over the next 1-3 year period. These goals and objectives may be categorized into member services, education, administrative or organizational areas and assigned to a task force of several individuals from the committee. Each task force is assigned the responsibility to develop an action plan to implement the goal or objective, establish a time frame for implementation, determine what budget impact the implementation process will have, establish measurement criteria for determining the success of implementing the goal, and finally, establish who within the association is responsible for the ultimate achievement of the goal or objective.

Responsible parties for these action plans will likely be a combination of management, staff and board members. By keeping all three groups involved in the implementation of your plan, you are assured that interest in the plan will remain high and that goals and priorities will be met. Following the implementation of your finalized strategic plan, an annual review should be held of the progress made to date within the strategic plan.

Goals which have been met should be dropped from the plan, new goals or objectives should be added and additional action plans should be developed to implement any new goals. By keeping the plan current and functional your strategic plan will remain a fluid document which is valid for years to come.

Core Values

At the heart of every organization are its core values, those unshakable principles, declarations and objectives that make the organization what it is. Without its core values, the organization would cease to exist. These are the core values of MSHO as defined by the Planning Committee.

We Promote Quality and Equality in Cancer Care

We Advocate for Providers of Cancer Care in All Clinical Settings

We Offer Credibility and Expertise on Key Oncology and Hematology Issues

We Champion Hematology and Oncology Research

We Support Cost Effective Care

We Provide Educational Resources for Providers, Policy Makers and the Public

We Communicate With Our Members

Our Mission:

*It is the Mission of MSHO
to promote exemplary care
for patients with cancer
and/or blood disorders
through advocacy,
education and research*

The Strategic Planning Process

SWOT Analysis

SWOT is an acronym for Strengths, Weaknesses, Opportunities and Threats. The SWOT Analysis is an important step in completing the strategic planning process.

During this exercise, the strategic planning committee is asked to provide opinions about the organization, its environment, likely future and current culture. The facilitator itemizes points made by committee members under one or more of the four SWOT categories.

By isolating important features about the organization's profile, we will gain valuable insight toward developing goals and objectives for our strategic plan.

Each committee member will be asked to draw upon their own experience with the organization and provide unembellished opinions about the organization's services, administration, current environment and future direction.

The information gleaned from the SWOT analysis will provide the foundation for establishing goals and priorities which are based on the organizations current strengths and by isolating areas where improvement is needed, or a change in policy direction is appropriate.

Strengths

Broad Based Membership

Strong Membership Retention

Participatory Membership

MSHO Has National Reputation for Excellence

Stable Administration

Credibility & Integrity

Strength through Cohesion

Collegiality

High Quality & Well Managed Education

Visibility

Networking

Strong Relationship with Third Party Payers

Strong Governance

Sponsors Get Value for Their Investment

Strong Financial Reserves

Responsive To Members

Centralized Resources

Weaknesses

Association Lacks a Consistent Sustainable Financial Model

Several Membership Factions Not Represented On Board

Relationship with Payers Must Be Expanded

Lack of Lobbyist

No Management Succession Plan

Opportunities

Increase Number of Sponsors

Develop Stronger Legislative Presence

Broaden Membership Categories

Provide Legislative Orientation

Reach Out to More Payers

Threats

Cost of Drugs

Uninsured and Under-Insured Patients

Fewer Graduates Specializing in Hematology & Oncology

Consolidation of Pharmaceutical Industry

Diminishing Private Practices

Futuring - Creating the Ideal MSHO

During this activity, the Committee was asked to list features they would like to see in the ideal association. Those features may or may not already be present in MSHO. Listed below were those features which were considered important by some committee members, but were not included in the organization's 1-3 year action plans as a primary goal or objective. As other goals and objectives are met, the Committee may want to address these items separately or incorporate them into an action plan as a subset of another goal.

Brand MSHO as Best Practitioners

Share Best Practices Knowledge with the Society

Become a Community/Patient Resource for Cancer Treatment Best Practices

Heighten Public Awareness of Hematology/Oncology

Serve as Practice Operations Consultants

Speakers Bureau/Podcasts

Improve Member Communication

Emphasize Outreach to Medical Residents

Foster Better Relations Between Academic & Private Practices

Champion Advocacy of End-Of-Life Care

Identify Research Priorities

Investigate Direct Pharma Buying Group Opportunities

Locum Support

Legislative Watchdog for Hot Issues

Centralized Patient Assistance Contact System/Website

Utilize Staff as Resource

Primary Goals & Objectives

The Committee was asked to rank the items on the Futuring list to determine which goals were the most important to create the ideal MSHO. Listed below are the five top priorities for MSHO in the coming 24 months:

Brand MSHO as Best Practitioners and Advocates
for Cancer and Hematologic Issues:

- Our Members
- Affiliated Organizations
- Patients
- Payers
- Legislators
- Public

Educate/Mentor Fellows to Retain them in Michigan Private Practices/Clinics

Establish Legislative Watchdog System for Hot Issues

Explore Hiring a Lobbyist

Diversify MSHO Financial Resources/Revenues