

# STRATEGIC PLANNING THE TENNESSEE WAY

## *Perspectives for Chapter Administrators*



# NEED A CHAMPION

- Suggest
- Encourage
- Share other Chapters' experiences
- Learn all you can
- Rhonda
- **Strategic Planning (in nonprofit or for-profit organizations)**
- [http://managementhelp.org/plan\\_development/str\\_plan/str\\_planning.htm](http://managementhelp.org/plan_development/str_plan/str_planning.htm)

# INSPIRATION

- ACS Leadership Conference 2008
- Chapter president - Tony Haley, MD
- Chapter administrator - Wanda Johnson
- Chapter pres-elect - Gayle Minard, MD





# PRE-PRE-PLANNING

- Worked through ACS
- Rhonda made arrangements with Dr. Preskitt
- Establish Dates
- Conference call – just us three
  - Structure
  - Culture
  - Chapter info



# PRE-PLANNING- CONFERENCE CALL

- **Facilitated by Dr. Preskitt and Rhonda Peebles, Chapter Services Manager**
- **Questions?**
  - **Who should be at the meeting?**
  - **How long should the meeting be?**
  - **What materials should be distributed?**
  - **What is the desired outcome?**

# QUESTION 1 - WHO

- **TN chapter governing body is the Executive Council**
  - **Officers**
  - **6 Councilors**
  - **Committee on Trauma Chair**
  - **Cancer Committee Chair**
  - **Young Surgeon's Rep**
  - **Surgical Resident**
  - **Governors-at-large and Specialty Governors**
  - **TN Surgical Quality Consortium Chair**

## QUESTION 2 - HOW LONG

- **Over a weekend?**
- **In one day?**
- **Dinner the night before & then get down to business first thing in the AM ?**



# **QUESTION 3**

## **MEETING MATERIALS**

- **Dr. Preskitt and Rhonda**
- **Templates for discussion**
- **Chapter information**
  - **Number of members**
  - **Specialty distribution**
  - **Financial summaries**



# **QUESTION 4**

## **DESIRED OUTCOME**

- **Chapter mission statement (what you do and why you do it)**
- **Chapter vision statement (the future state of the organization as envisioned by the leaders)**
- **Priorities**
- **Strengths, weaknesses, opportunities and threats (SWOT)**
- **Written operating plan**



# LOGISTICS

## MEETING SITE

conference  
style – U-shaped –  
Internet access – room  
for small groups



## RECORD DISCUSSION

flip charts  
laptops



## FUN TIME



# STRATEGIC PLANNING MEETING

- **Kick-off!**
- **Reviewed qualities of good chapters**
  - **Young surgeons**
  - **Good administrative structure**
  - **Strong enthusiasm**
- **Reviewed qualities of good leadership including “vision”**



# STRATEGIC PLANNING

- **Establish goals**
- **Set priorities**
- **Allocate resources**
- **Assign tasks**
- **Measure success**



# STRATEGIC PLANNING

- **Develop a mission statement**
- **Describe the vision of the chapter**
- **Conduct a SWOT analysis**
- **Set goals**
- **Write a plan**



# MISSION STATEMENT

*The Mission of the TN chapter, ACS, is to improve the health of the people of Tennessee and the Southeastern Region of the United States by promoting the ethical practice of the art and science of surgery*



# VISION STATEMENT

*The TN Chapter is dedicated to*

*\*the promotion of membership*

*\*the provision of advocacy for surgeons and patients*

*\*the education of surgeons and surgical residents, and*

*\*the ultimate improvement and measurement of patient care and safety.*

*The Chapter provides a network for the Fellows of the State and serves as their liaison to the ACS*



# SWOT ANALYSIS - STRENGTHS

- **Consistent, enthusiastic leaders**
- **Cohesive core group**
- **Well attended annual meeting**
- **Tennessee NSQIP**
- **Trauma program/system**



# SWOT ANALYSIS - WEAKNESSES

- Need more widespread participation
- Lack of specialty representation
- Tend to be too academic and not enough for the private practitioner
- Not enough young surgeon participation
- Perceived lack of relevance
- Outdated website
- Ineffective lobbying efforts
- Chapter finances
- No Regent participation



# SWOT ANALYSIS - OPPORTUNITIES

- **Reach out to practicing surgeons**
  - Practice management
  - Responding to changing in ER call contracts
- **Educate members about their worth to hospitals and society**
- **Public education about what being a Fellow means**
- **Can use internet and new technology to connect with younger surgeons**



OPPORTUNITY

# SWOT ANALYSIS - OPPORTUNITIES

- Embrace affiliates - OR nurses
- Expand Cap Wiz for state advocacy
- We can be leaders in quality, especially with NSQIP
- Increase revenue from vendors at meetings
- Promote surgery as a career to med students
- Promote college membership
- Expand the council with specialty representation



OPPORTUNITY

# SWOT ANALYSIS - THREATS

- Malpractice costs and damage of litigation
- Splintering of general surgery
- Workforce shortage
- Safety net hospitals
- Increasing ranks of uninsured patients
- Outside interference in practice
- Hospitals hiring surgeons



# GOALS - INCREASE MEMBERSHIP

- Target young surgeons
- Address relevancy in areas of education
- Publicize our leadership role in quality
- Control the message





# **GOALS - PUBLICIZE OUR ROLE IN QUALITY**

- **Promote NSQIP in Tennessee hospitals (enroll 30)**
- **Report quality data at annual meeting within 3-5 years**
- **Publicize the chapter's work with NSQIP**

# GOALS - INCREASE ADVOCACY

- Increase subspecialty participation
- Participate with the Tennessee Medical Association on legislative issues
- Create a legislative newsletter
- Work on tort reform
- Address workforce issues
- Educate legislators and public about access and reimbursement issues
- Maintain Tennessee helmet law
- Repeal UPPL





# **GOALS**

## **RE-VAMP ANNUAL MEETING**

- **Expand program committee**
- **Keep positive aspects (fun, family)**
- **Involve program directors and residents**
- **Be more proactive in getting resident papers**
- **Sponsor medical students**
- **Change meetings site every 3 years**
- **Invite ACS rep to do a town hall type meeting**
- **Consider webinars, teleconferencing**

# GOALS - IMPROVE COMMUNICATION

- **Improve website with more current and relevant information**
- **Include info on NSQIP and strategic plan**
- **Assign officer level web master**
- **Look into Facebook/chatrooms or other social networks to maintain communication**





# STRATEGIC PLANNING

- **Goals were made**
- **Tasks were assigned**
- **Timetable developed**
- **Summary sent out for approval**



# **STRATEGIC PLANNING MEASURES OF SUCCESS**

- **Improved financial status**
- **Increased participation in annual meeting**
- **Increased participation in advocacy issues**

# STRATEGIC PLANNING

## WHERE THE RUBBER MEETS THE ROAD





# MAKING IT HAPPEN

❖ Summary of meeting

❖ Continuous follow-up

❖ Written Plan

❖ Know your docs

❖ Tasks - tracking

❖ Moving target

# STRATEGIC PLANNING

## WHERE THE RUBBER MEETS THE ROAD





# STRATEGIC PLANNING

## Corollary #1

If you miss a deadline,  
**CHANGE THE DEADLINE!!!**

# GOAL - IMPROVE YOUNG SURGEON INVOLVEMENT

<b>Communicate With Program Directors</b>	<b>PARTIAL</b>
<b>Put Program Directors on Council</b>	<b>YEP</b>
<b>Involve resident liaisons more</b>	<b>PARTIAL</b>
<b>Request Regents and reps from subspecialties</b>	<b>PARTIAL</b>
<b>Develop Facebook type page</b>	<b>NOPE</b>

# GOAL - ADDRESS NEEDS OF PRACTICING SURGEONS

**ANNUAL PROGRAM -  
things you don't  
learn in residency**

**Sort - of**

# **GOAL - PUBLICIZE TNACS LEADING ROLE IN QUALITY**

<b>Put NSQIP info on chapter website</b>	<b>LATE BUT IN PROCESS</b>
<b>Draft notice regarding Collaborative for newspapers</b>	<b>LATE BUT IN PROCESS</b>
<b>Publish our experience in the Bulletin</b>	<b>DONE</b>
<b>Report NSQIP at annual meeting</b>	<b>YES!!</b>

# GOAL - ADVOCACY

<b>Work with TMA on tort form</b>	<b>Not a good topic in legislature right now, on hold</b>
<b>Attend TMA meetings and voice our opinion, support</b>	<b>YES</b>
<b>Communicate regarding legislative issues on website</b>	<b>YES</b>

# GOAL - RE-VAMP ANNUAL MEETING

<b>Survey members re: preferences</b>	<b>NOPE</b>
<b>Increase fees from vendors</b>	<b>YES</b>
<b>Change order of meeting with business earlier in meeting and papers later</b>	<b>YES</b>
<b>Consider joint meeting with trauma Liaisons, AORN, etc.</b>	<b>MAYBE NEXT YEAR</b>
<b>Add cancer paper competition</b>	<b>YES</b>

# GOAL - IMPROVE COMMUNICATION

<b>Spotlight member</b>	<b>IN PROCESS</b>
<b>Spotlight legislative issues</b>	<b>YES</b>
<b>Links to congressmen</b>	<b>QUALIFIED YES</b>
<b>Minutes/summaries of meeting and strategic planning</b>	<b>IN PROCESS</b>

# SUMMARY

- “The miracle isn’t that I finished. The miracle is that I had the courage to start.”® *John “The Penguin” Bingham*
- Establish goals
- Set priorities
- Allocate resources
- Assign tasks
- Measure success



