

Scoliosis Research Society

STRATEGIC PLAN UPDATE

March 11, 2009



Consultation and Facilitation by Cate Bower



SRS STRATEGIC PLAN – MARCH 2009

CORE IDEOLOGY

Core ideology describes an organization's consistent identity that transcends all changes related to its relevant environment. Core ideology consists of two notions: **core purpose** – the organization's reason for being – and **core values** – essential and enduring principles that guide an organization.

CORE PURPOSE:

The purpose of the SRS is to foster optimal care for all patients with spinal deformity

CORE VALUES:

1. Education
2. Research
3. Patient Advocacy
4. Ethical Practice

BIG HAIRY AUDACIOUS GOAL:

A clear and compelling catalyst that serves as a focal point for effort

The Scoliosis Research Society's global leadership in research and education will result in significantly enhanced quality of life for all patients with spinal deformities

VIVID DESCRIPTION:

Describes how the world could be different for key stakeholders such as members, customers, the public, community, the association, etc. as a result of attaining its Vision.

1. SRS will be the leading source of information and knowledge on spine deformity.
2. Electronic dissemination of information will permit instant access to the intellectual resources of SRS no matter where the source of the inquiry.
3. SRS will be recognized as the preeminent force in research and education on spinal deformities
4. SRS will be the first thought of resource on spine deformity
5. The website will be the first source for scoliosis families
6. SRS will be a major advocate for research funding with government and other funders
7. Members will be recognized for their expertise
8. Funding sources and third party payers will understand the value of what SRS members do
9. SRS will be making measurable progress towards prevention
10. SRS will be financially positioned to fund the major research initiatives in spine deformities
11. Worldwide outreach will be the norm
12. The scoliosis genes will be identified

3-5 Year Planning Horizon

The following represents long-range goals and objectives for the next 3-5 years. These **goals** are outcome-oriented statements that represent what will constitute the organization's future success. The achievement of each goal will move SRS towards the realization of its vision. Objectives have been reordered in priority.

EDUCATION GOAL:

The Scoliosis Research Society will be a global resource for quality education on spinal deformities

Objectives

1. Make the Scoliosis Research Society website a primary source for current and accurate information regarding spinal deformity for members, medical professionals¹ and the public
2. Enhance the educational value of the annual and IMAST² meeting
3. Increase educational opportunities for spine deformity surgeons where there is limited access to training
4. Position Scoliosis Research Society as the primary provider of CME spinal deformity courses by various delivery methods
5. Increase Spinal Deformity training for underserved areas in order to increase access to spinal deformity care (from Fellowship)
6. Partner with other organizations to provide high quality spinal deformity education

RESEARCH GOAL:

The Scoliosis Research Society will be a leading facilitator of spine deformity research

Objectives:

1. Increase awareness of available funds and criteria for research
2. Improve the quality of evidence in spinal deformity clinical research
3. Ensure a continued funding stream for research
4. Create and promote young spinal deformity researchers
5. Conduct ongoing critical evaluation of the M&M process
6. Expand the Scoliosis Research Society's leadership role in influencing the directions in spinal deformity research
7. Maximize our ability to assess our research efforts

¹ Physician, ortho surgeons, neurosurgeons, peds, family practitioners, allied health providers and mid level providers, researchers

² Ultimately apply evaluation to all educational offerings

FUNDING GOAL:

The Scoliosis Research Society will have a funding base large and diversified enough to ensure financial stability in funding education, research and advocacy with sound fiscal operating policies.

Objectives

1. Increase Societal funds from outside/external source
2. Increase operating revenues both in terms of dollars and sources and decrease operating expenses in order to support SRS programs and decrease operating expenses in order to support SRS programs
3. Further diversification of SRS funding through additional vehicles, such as a separate SRS education and research fund and addition of an SRS research escrow account
4. Increase Societal funds from internal sources (member donors)

FELLOWSHIP GOAL:

Through its programs and services, the SRS will attract qualified individuals world wide to Fellowship and participation

Objectives

1. Increase the number of members world wide
2. Increase awareness of and opportunities for leadership level involvement by members world wide
3. Implement a worldwide mentorship program

ADVOCACY GOAL:

The Scoliosis Research Society will be recognized as the (a) leading resource for information and public policy on spinal deformities.

Objectives

1. Increase our effectiveness in advocating for optimal care of patients with spinal deformity
2. Increase awareness by the public and SRS member's patients and families about Scoliosis Research Society and spinal deformity
3. Increase key stakeholders recognition of SRS's expertise as a primary resource on issues related to Spinal Deformity

ORGANIZATIONAL LEADERSHIP GOAL:

The leaders of the Scoliosis Research Society will operate in a manner consistent with the organization's stature as the pre-eminent spinal deformity society.

Objectives:

1. Increase our ability to identify and develop future Scoliosis Research Society leaders
2. Increase the engagement of all Scoliosis Research Society members into society activities
3. Increase involvement of members from all regions of the world into Scoliosis Research Society leadership positions
4. Increase operational effectiveness across the organization
5. Increase awareness of and promote ethical practice

STRATEGIES

Changes in strategies emerging from the Las Vegas Discussions are reflected below

Education

The Scoliosis Research Society will be a global resource for quality education on spinal deformities

Objectives and Strategies

1. Make the Scoliosis Research Society website a primary source for current and accurate information regarding spinal deformity for members, medical professionals³ and the public
 - Strategies*
 - a. Assess and improve the attractiveness, ease of navigation, usefulness and value of the website
 - b. Improve the quantity and quality of patient information on the SRS website.
 - c. Improve the quantity and quality of member and medical professionals information on the website.
 - d. Develop and implement a plan to increase awareness of the website as a key source of information
 - e. Capitalize on opportunities presented by the new spine deformity online textbook
 - f. Explore what would be entailed in creating an international journal of spinal deformity (capture the gap between text book and journal and explore Wikipedia concept)
 - g. Explore avenues to increase website traffic, both domestic and i.e., increasing the languages available
 - h. Explore cost optimization strategies
 2. Enhance the educational value of the annual and IMAST⁴ meeting
 - Strategies*
 - a. Explore the different formats for the scientific components of the meeting
 - b. Explore other venue options to optimize attendance and economic concerns
 - c. Evaluate cost optimization opportunities
 - d. Develop and implement a marketing plan
 - e. Improve the process of periodic assessment
 - f. Facilitate attendance by international surgeons, young surgeons, neurosurgeons, surgeons in training and allied health and scientists
 - Tactics*
 - i. Consider strategies to increase the diversity of paper presentations without affecting the quality
 - ii. Additional value in the scientific program for the target group (e.g., translation)
 - iii. Expand scholarship programs
 - iv. Enhance opportunities for participation by the targeted groups in the meeting program
 - v. Promote SRS value at the meetings via booth
 3. Increase educational opportunities for spine deformity surgeons where there is limited access to training
 - Strategies*
 - a. Assess educational needs for international surgeons
 - b. Explore the use of technology to deliver more education
 - c. Further develop and disseminate the regional course program

³ Physician, ortho surgeons, neurosurgeons, peds, family practitioners, allied health providers and mid level providers, researchers

⁴ Ultimately apply evaluation to all educational offerings

- d. Explore educational opportunities other than ANNUAL MEETING and IMAST for spine deformity surgeons where there is limited access
4. Position Scoliosis Research Society as the primary provider of CME SPINAL DEFORMITY courses by various delivery methods
- Strategies*
- a. Explore use of technology to provide increased CME opportunities
 - b. Monitor the advantages and disadvantages of expanded CME offerings
 - c. Explore opportunities to partner with other organizations to provide CME
 - d. Assess other approaches to education – tutorials, etc.
5. Increase Spinal Deformity training for underserved areas in order to increase access to spinal deformity care
6. Partner with other organizations to provide high quality spinal deformity education
- Strategies*
- a. Propose the resulting definition to the members and to other related societies (POSNA, NASS, AANS) and international bodies
 - b. Advocate for the use of the SPINAL DEFORMITY curriculum
 - c. Continuously identify the underserved areas
 - d. Assess the impact of care vs. training
 - e. Assess the potential role of technology to increase and improve training

Research

The Scoliosis Research Society will be a leading facilitator of spine deformity research

<u>OBJECTIVES AND STRATEGIES</u>

1. Increase awareness of available funds and criteria for research

Strategies

 - a. Promote the availability of research grants and the process to apply
2. Improve the quality of evidence in spinal deformity clinical research
3. Ensure a continued funding stream for research

Strategies

 - a. Receive clear level of annual funding for research
 - b. Create mechanism to determine more predictable annual research funding
 - c. Create an annual escrow account for funds allocated
 - d. Periodically re-evaluate allocation strategy from funding sources
4. Create and promote young spinal deformity researchers
5. Conduct ongoing critical evaluation of the M&M process

Strategies

 - a. Communicate changes in M&M strategy and implementation process to the membership on a regular basis
6. Expand the Scoliosis Research Society’s leadership role in influencing the directions in spinal deformity research

Strategies

 - a. Involve the existing clinical study groups and their activities
 - b. Develop a plan for evaluating the initiation of an Scoliosis Research Society guided clinical study

- c. Ensure compliance with conflict of interest disclosure by authors
 - d. Develop directed research priorities
7. Maximize our ability to assess our research efforts

Strategies

- a. Continue to improve and evaluate the process for evaluating the subsequent productivity of a research grant recipient, i.e., presentations, peer review publications and subsequent grants
 - i. Communicate findings to membership and grant recipients
- b. Continually strengthen the process for evaluating the scientific outcome of each funded grant
 - i. Communicate findings to membership and grant recipients
- c. Evaluate the impact of the grants vis a vis the value of funding

Funding

The Scoliosis Research Society will have a funding base large and diversified enough to ensure financial stability in funding education, research advocacy with sound fiscal operating policies.

OBJECTIVES AND STRATEGIES

1. Increase Societal funds from outside/external source

Strategies

- a. Develop a philanthropic program to encourage non-medical sources to contribute to the Scoliosis Research Society
- b. Develop new programs to encourage medical industry contributions for both education and research support
- c. Engage consultants for fund raising advice and execution
- d. Develop a program to encourage donations from non-members

2. Increase operating revenues both in terms of dollars and sources and decrease operating expenses in order to support SRS programs

Strategies

- e. Increase revenue through innovative educational strategies (i.e., e-journals, web site advertising, etc)
 - i. Coordinate funding strategy with educational committee
- f. Examine opportunities for selective line item reductions
- g. Program reduction or elimination

3. Further diversification of SRS funding through additional vehicles, such as a separate SRS education and research fund, and addition of an SRS research escrow account

4. Increase Societal funds from internal sources (member donors)

Strategies

- h. Establish a development program in Scoliosis Research Society that helps members identify and guide potential donors
- i. Create ways to encourage all members to contribute to the Society –and implement Road Map to Philanthropic Participation
- j. Increase opportunities for designated giving to support specific programs
- k. Increase opportunities for donations through other vehicles to SRS

Fellowship

Though its programs and services, the SRS will attract qualified individuals world wide to Fellowship and participation

<u>OBJECTIVES AND STRATEGIES</u>

1. Increase the number of members world wide
Strategies
 - a. Identify and recruit qualified individuals
 - b. Make the admission program more attractive
 - c. Establish relationships with major Spinal Deformity organizations worldwide
 - d. Increase the world wide involvement in Annual Meeting and IMAST
2. Increase awareness of and opportunities for leadership level involvement by members world wide (should fall under leadership goal)
Strategies
 - a. Identify the pool of potential Scoliosis Research Society non-North American candidates
 - i. Explore a member based recruitment program
 - b. Explore leadership development opportunities
3. Mentorship: Implement a world wide mentorship program (new)
 - a. Identify new members
 - b. Provide with **local** contacts
 - c. Create a forum for professional development of junior members to enhance their participation in the Fellowship
A metric might be seeing them through the Fellowship process

Advocacy

The Scoliosis Research Society will be recognized as the leading resource for information and public policy on spinal deformities.

<u>OBJECTIVES AND STRATEGIES</u>

1. Increase our effectiveness in advocating for optimal care of patients with spinal deformity
Strategies
 - a. Enable access to treatment for patients with spinal deformity
 - b. Directed research funding with annual review of funding priorities
 - c. Standard accepted practices
 - d. Increase Scoliosis Research Society's efforts to influence medical liability reform
Tactics for all above
 - i. Increase Scoliosis Research Society support for effective lobbying activity at federal and state levels
 - ii. Encourage Scoliosis Research Society members to donate or commit financial resources to existing efforts
 - iii. Encourage creation of standardization of spinal cord monitoring
 - iv. Create a prioritized list of items we'd like lobbyists to work on our behalf
2. Increase awareness by the public and SRS member's patients and families about Scoliosis Research Society and Spinal Deformity
Strategies
 - a. Improve the website
 - b. Encourage members to use existing educational materials available through Scoliosis Research Society (FAQ section on website)
 - c. Establish a policy on how to handle patient/family inquiries
 - d. Explore the option of creating new educational materials
3. Increase key stakeholders recognition of SRS's expertise as a primary resource on issues related to Spinal Deformity

Strategies

- a. Educate Scoliosis Research Society members
- b. Improve the website
- c. Enhance Scoliosis Research Society's liaison with AAP, AAOS, POSNA and other stakeholders
- d. Inform state and local officials re issues related to Spinal Deformity
- e. Improve awareness through public service
- f. Support education and training of school nurses, paramedical and non medical personnel involved in school screening

Organizational Leadership

The leaders of the Scoliosis Research Society will operate in a manner consistent with its stature as the pre-eminent spinal deformity society.

<u>OBJECTIVES AND STRATEGIES</u>

1. Increase our ability to identify and develop future Scoliosis Research Society leaders

Strategies

- a. Create and implement a leadership development program for Scoliosis Research Society members
 - i. Build upon programs and best practices that already exist elsewhere
 - ii. Clearly define path to leadership and communicate it to members through various channels

2. Increase the engagement of all Scoliosis Research Society members into society activities

Strategies

- b. Create mechanism for increasing participation for all Scoliosis Research Society members

3. Increase involvement of members from all regions of the world into Scoliosis Research Society leadership positions

Strategies

- c. Create a mechanism through personal contact or organizational relationships to attract members from all disciplines and regions to the Scoliosis Research Society
- d. Implement a program to include international members on committees, committee chairs and board level positions

4. Increase operational effectiveness across the organization

Strategies

- e. Maintain currency of policy and procedures manual
- f. Periodic review of organizational structure

5. Increase awareness of and promote ethical practice

Strategies

- g. Further define conflict of interest and create awareness of its importance