



Strategic Plan 2023-2025

FINAL

Ohio State Medical Association Strategic Plan 2023-2025 DRAFT

Background:

The OSMA Council and senior staff met on August 20, 2022 to develop the strategic plan to guide the organization through 2025. The Council reviewed the 2020-2022 Strategic Plan final report and considered future resource projections facing the association.

The final plan was adopted by the Council on October 15, 2022.

For 2023-2025, the OSMA will continue to focus on the following issue areas:

- Resiliency and Growth
- Advocacy
- Healthier Ohio Physicians and Patients
- Governance and Operations
- Engagement

Ohio State Medical Association Strategic Plan 2023 - 2025

Issue Area: Resiliency and Growth

Goal: OSMA will increase physician engagement over the next 3 years to enhance membership and partnerships in order to maintain financial stability

Objective	Action Steps	Success Indicators	Accomplishments
1. Review and revise as needed marketing and member recruitment/retention strategies	<ul style="list-style-type: none"> • OSMA Membership Committee to continue to modify and implement short term and long term strategic marketing/communications plan • Continue to work with Approach Marketing to review and enhance the member experience 	<ul style="list-style-type: none"> • Strategic marketing/communication plan developed annually • Membership Committee provides feedback on the marketing/communications strategies and tactics at each committee meeting – focusing on the effectiveness of specific OSMA communications • Approach liaison to meet with the Membership Committee at least once each year 	
2. Grow diverse professional development and leadership opportunities	<ul style="list-style-type: none"> • Focus on building mentorship, wellness and advocacy leaders • Expand mentorship program for members through in-person and virtual forums • Continue to develop strategies to connect new members to activities within the OSMA in a targeted way • Ongoing - identify and utilize current leaders in medicine in Ohio in other health care settings-CMOs, Medical Directors, etc., to promote OSMA activities • Develop, promote and host Advocacy/Leadership Boot Camp 	<ul style="list-style-type: none"> • Report annually on mentorship program participation. Increase participation by at least 10% • Conduct survey of mentors/mentees • Report specific data showing new member participation (joined in the last two years) in OSMA activities/programs both virtual and in person • Report specific data showing organizational health leaders participation in OSMA initiatives • Report on Advocacy Boot Camp participation and retention/join rates of those that participate Also report on if participants then become active in OSMA PAC or advocacy committees 	

<p>3. Continue to seek alternate revenue streams</p>	<ul style="list-style-type: none"> • Conduct regular review of other states' non-dues revenue streams • Continue to seek association management and grant opportunities • Seek to further build contacts and relationships and review opportunities for corporate support • Review current Corporate Sponsorship program and redefine to provide more detailed, specific packages 	<ul style="list-style-type: none"> • Report annually to A&A on other states' revenue streams and successes • Increase grant/association revenue by 10% annually • Increase corporate support by 20% annually • Annually review corporate sponsor and vendor partners Add/subtract from partnerships based on value and use 	
<p>4. Evaluate new and different membership models/options</p>	<ul style="list-style-type: none"> • Make the Membership Task Force a permanent committee – ensure committee reviews what we have tried in the past and reports this to Council • Continue to develop or create with the Membership Task Force and leadership hospital/group membership and benefits 	<ul style="list-style-type: none"> • Create a Council resolution in 2023 to revise bylaws to make the membership task force a permanent committee • Create a hospital affiliation program to market to hospital leadership • Annually review current membership model and recommend any changes for January Council meeting - create a resolution for changes if needed 	
<p>5. OSMA Foundation growth</p>	<ul style="list-style-type: none"> • Define specific steps to grow the Foundation with both fundraising and programs 	<ul style="list-style-type: none"> • Create a fundraising plan and goals developed each year by Foundation Board • Increase Foundation funding by at least 10% annually through grant, corporate and individual giving • Develop new fundraising activities and programming including at least one annual event 	
<p>6. Continue to seek operational efficiencies</p>	<ul style="list-style-type: none"> • Continued review of all operational expenses • Modify and develop new processes to manage activities as needed 	<ul style="list-style-type: none"> • Identify at least three operational expense areas each year to reduce/modify resource and overall expense 	
<p>7. Increase personal interactions with physicians</p>	<ul style="list-style-type: none"> • OSMA leaders will participate actively at the local level – demonstrate boots on the ground leadership 	<ul style="list-style-type: none"> • Councilors will Report quarterly on level of local activities and potential associated impact 	

	<ul style="list-style-type: none">• OSMA leadership to participate in Top Tier group visits• Grow OSMA Ambassador program and utilize to promote OSMA peer to peer• Utilize OSMA Mentorship program to promote OSMA peer to peer	<ul style="list-style-type: none">• Conduct at least 10 top tier practice visits annually• Add 20 new OSMA Ambassadors in 2023 and report to Council on ambassador engagement with their peers• Report on mentor/mentee experience in at least one OSMA e-newsletter and one issue of Ohio Medicine and membership recruitment materials	
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Ohio State Medical Association

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Issue Area: Advocacy

Goal: OSMA will be the voice for physicians advocating the role of professionals in the changing health care landscape and working collaboratively with like-minded health care organizations

Objective	Action Steps	Success Indicators	Accomplishments
<p>1. Continue to enhance volunteer opportunities for OSMA members interested in involvement in advocacy efforts through advocacy restructure</p>	<ul style="list-style-type: none"> • Form and facilitate use of advocacy subcommittees to: <ul style="list-style-type: none"> ○ Obtain and use the knowledge and experience of “content experts” on advocacy issues; and, ○ For more efficient legislative/regulatory position decision-making process • Implement streamlined Focused Task Force on State Legislation (FTFSL) process • Continue regulatory review processes as needed • Teach OSMA members how to be an extension of the Government Relations team via the Advocacy Boot Camp (held twice a year) 	<ul style="list-style-type: none"> • Report annually on the use of new advocacy subcommittees – number of members, number of meetings/interactions • Expand relationships with state regulators and agencies – increase participation in rulemaking process – report annually on rules followed and actively engaged • Provide a review of each boot camp – number of participants, evaluations, member retention/recruitment of participants, participation of participants in future advocacy efforts 	

<p>2. Continue to strengthen collaboration and relationships with state and national medical and specialty societies and other interested healthcare organizations with a particular focus on our relationship and advocacy with AMA</p>	<ul style="list-style-type: none"> • Continue coordination with House of Medicine with regular communication throughout the year on specific issues • Allow specialty groups that do not have an Ohio presence to have a national partner as a part of the House of Medicine • Continue to include and leverage the impact of national partners on regulatory and legislative issues • Establish more coordinated efforts and relationships with patient advocacy groups, including the coalition formed around the prior authorization reform bill, the vaccine advocacy coalition, and the Power to the Patient coalition • Coordinate with the HOM members on specialty specific advocacy day dates and combine so we can offer advocacy days to our members as well. Add a link on our website that houses the dates and times of the advocacy days. Work to revamp the medical student and resident advocacy day at the statehouse • Coordinate with AMA on priority issues that need to be communicated to the Ohio Congressional delegation • Share communications on these issues with Ohio delegation to AMA 	<ul style="list-style-type: none"> • Conduct 2 HOM meetings annually • Form and utilize partnerships with patient advocacy groups on legislative issues • Conduct Specialty-specific advocacy days – report on those conducted to Council • Prior to the AMA annual and fall meeting communicate to Ohio delegation to AMA on issues about which OSMA coordinated with AMA 	
<p>3. Enhance communications and engagement opportunities to OSMA members and nonmembers on advocacy efforts</p>	<ul style="list-style-type: none"> • Continue regular coordination with marketing department to carry out advocacy communications strategy promoting OSMA victories to both members and nonmembers, including increased utilization of social media • Work on more real time communication though Twitter or other social media platforms • Incorporate texts into regular communications on advocacy (for non-emergent issues, potentially coordinate with content of monthly e-bulletins) 	<ul style="list-style-type: none"> • Continued/improved open rates and link clicks of advocacy e-bulletins • Increase social media engagement and followers on advocacy related content and report data to Council • Increased text-to-advocate engagement by at least 10% annually 	

	<ul style="list-style-type: none"> • Proactively identify and increase OSMA involvement on small business issues that are impactful to self-employed and independent physicians • Work within Government Relations team and restructured FTFSL to set proactive OSMA policy agenda by crafting 1-2 proactive legislative priorities each general assembly • Continue to build upon our engagement opportunities for members, i.e., VoterVoice, having physicians participate in the legislative process through submitting testimony, etc. 	<ul style="list-style-type: none"> • Advocate for at least one OSMA led proactive legislative initiative annually • Increase use of VoterVoice engagement by 10% annually 	
<p>4. Strengthen and grow OSMA political activities/OSMAPAC</p>	<ul style="list-style-type: none"> • Focus on large practice meetings during legislative off-session time to communicate about OSMA advocacy work, incorporate PAC contribution ask • Encourage more members to donate to OSMAPAC via monthly contributions • Identify and recruit OSMAPAC District “Ambassadors” by targeting current OSMAPAC donors • Continue grassroots efforts with the OSMAPAC and efforts to increase PAC donors <ul style="list-style-type: none"> a. Example: Intro PAC email for new members? • Develop strategy for increasing PAC contributions of nonmembers & use nonmember grassroots advocacy strategy to identify additional physicians interested in specific issues and potentially in OSMA membership • Continue one-on-one OSMA member outreach to target specific elected officials 	<ul style="list-style-type: none"> • Conduct at least 6 large practice visits annually • Increased “new” PAC donors by 5% annually, both members and nonmembers, including through use of monthly personal outreach • Identify 1-2 Ambassadors for each PAC District • Develop comprehensive annual PAC strategy for outreach, retention and new donors • Proposed at least twice a year communication to all Ohio physicians highlighting legislative work by OSMA and encouraging PAC participation and contributions 	

<p>5. Increase advocacy efforts on issues specific to employed physicians</p>	<ul style="list-style-type: none"> • Conduct weekly touch bases with hospital systems and coordinate with hospital government relations staff on specific issues during legislative session in order to identify potential partnerships, and streamline advocacy efforts • Identify mutual issues of interest between health systems and coordinate advocacy efforts • Outreach (including advocacy efforts) to hospital medical staff coordinators 	<ul style="list-style-type: none"> • Launch Health System Affiliation program in 2023 and initiate GR component • CEO or GR team meet monthly with OHA/health system government relations teams to review issues impacted employed doctors • Collaborate on at least 1 initiative annually with OHA/health system government relations teams • Include at least one advocacy topic in monthly medical staff email communications 	
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Ohio State Medical Association Strategic Plan 2023 - 2025

Issue Area: Healthier Ohio Physicians and Patients

Goal: OSMA will support the health, personal and professional development of physicians as well as lead and support physicians as they address patient health improvement and public health needs.

Objective	Action Steps	Success Indicators	Accomplishments
1. Continue OSMA physician well-being programming	<ul style="list-style-type: none"> • Seek and evaluate additional partnerships: metro parks, health clubs, gyms, grocery stores for OSMA members • Promote, and schedule regional educational events that educate physicians about current well-being efforts and give them an opportunity to discuss work/life stressors and what needs to be done to improve physician well-being • Continue to promote the OSMA Well-being CARE Service - which is anonymous, free of charge, open to all healthcare workers and not tied to place of employment/licensure • Partner with organizations throughout the state that employ, represent or communicate with healthcare professionals to help spread the word about the CARE Service • Work with the Ohio Physician Wellness Coalition to support the Physician Wellness Webinar Series by certifying webinars for <i>AMA PRA Category 1™ credit</i> 	<ul style="list-style-type: none"> • Implement 4 in person awareness events to promote the Well-Being CARE Service • Partner with other medical societies, hospitals and health systems and medical related associations around the state to communicate CARE widely • Continue collaboration w/OPWC & OPHP by supporting education with category 1 CME credits • Increase CARE service usage by 25% annually 	
2. Continue focus on physician life cycle personal and professional development (includes young physicians, residents and students)	<ul style="list-style-type: none"> • Increase physician advocacy leaders • Work with Young Physicians Section (YPS) to increase OSMA awareness • Pursue ways to facilitate seasoned physicians mentoring young physicians 	<ul style="list-style-type: none"> • Continue Summer Scholars stipends and increase the number of stipends annually • Increase engagement with YPS members as ambassadors 	
3. Implement the Healthier Ohio initiative	<ul style="list-style-type: none"> • Increase awareness and physician participation in the public health issues • Create an initiative where practices can get involved in addressing health 	<ul style="list-style-type: none"> • Implement LINK Initiative communicating and connecting practices to technology and pathway 	

	<p>outcomes</p> <ul style="list-style-type: none"> • Create health information content that is more public facing that can be used by our members to communicate with the public • The primary care/public health advocacy committee will identify legislative and/or regulatory changes that would assist in the implementation of identified initiatives • Provide opportunities for engagement through the newly formed DEI workgroup 	<p>hubs to best address SDOH for their patients and ultimately impact health outcomes</p> <ul style="list-style-type: none"> • Develop at least one communication campaign that OSMA members can use to distribute to their patients regarding public health – with a focus on issues where there is misinformation in the market • Implement one external initiative developed by the DEI workgroup 	
<p>4. Increase collaboration with public health related initiatives</p>	<ul style="list-style-type: none"> • Support and promote local-health department programs and community efforts • Work with the AMA to further their goal to of prevention and treatment of chronic hypertension, prediabetes and diabetes • Work with the Ohio Pregnancy Associated Mortality Review workgroup to combat maternal mortality in Ohio 	<ul style="list-style-type: none"> • Annually increase the number of social media promotions of public health related “days” – e.g. advance directive week - report data to Council • Amplify public information messages re hypertension, prediabetes and diabetes • Developed communications and partnerships focused on ODH maternal health programs 	

<p>5. Identify and educate Ohio physicians and patients regarding health misinformation</p>	<ul style="list-style-type: none">• Educate the public to identify valid resources for health information• Establish OSMA as a valid health information resource for Ohio physicians and patients• Work with the DEI workgroup to identify issues relevant to marginalized populations	<ul style="list-style-type: none">• Implement one internal and one external initiative developed by the DEI workgroup (same as 3)• Develop at least one communication campaign that OSMA members can use to distribute to their patients regarding public health with a focus on issues where there is misinformation in the market (same as 3)	
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Ohio State Medical Association

Strategic Plan 2023 - 2025

Issue Area: Governance and Operations

Goal: OSMA will continuously evaluate its governance structure to ensure representation and input from all physicians and physician practice settings and manage operations within budget.

Objective	Action Steps	Success Indicators	Accomplishments
1. Continue to assess membership models -relates to both sustainability and governance	<ul style="list-style-type: none"> • Membership committee to review both physician member options as well as non-physician options, e.g. hospital based, employed, corporate, allied health – and make recommendations • Establish a standing Membership Committee instead of the current Task force • Explore potential affiliations with Health Systems 	<ul style="list-style-type: none"> • Create a Council resolution in 2023 to revise bylaws to make the membership task force a permanent committee (same as 4 in resiliency and growth) • Create a hospital affiliation program to market to hospital leadership (same as 4 in resiliency and growth) • Annually review current membership model and recommend any changes for January Council meeting - create a resolution for changes if needed (same as 4 in resiliency and growth) 	.
2. Explore new methods for identifying OSMA leaders	<ul style="list-style-type: none"> • Revise the nominating committee process • Add on to mentor program – use past presidents for intentional development of leaders • Improve ways to engage interested physicians into leadership 	<ul style="list-style-type: none"> • Bylaws changes adopted and implemented to improve nomination process for OSMA leaders • Increase Past presidents/leader 	

		participation as mentors <ul style="list-style-type: none"> • Metrics/goals/tasks established for a formal mentorship program (see success indicators under resiliency and growth) 	
3. Address Governance spending	<ul style="list-style-type: none"> • Create a Task force to review current practices and costs • Increase AMA delegation accountability to report on its activities and how they relate to the OSMA and OSMA policy • Create a policy as part of the Council handbook for authorizing out of state travel by leaders that defines spending guidelines and accountability for reporting back – to be reviewed annually • Review and report to Council on the Council compensation comparison between the OSMA and other similar states, including recommendations for changes • Review Annual meeting cost 	<ul style="list-style-type: none"> • Task force created by first quarter of 2023 • OSMA governance spending policies reviewed and updated annually with goal of limiting governance spending no more than 15% of total budget – including annual meeting, Council meetings and AMA delegation • All committee reports completed by October each year for OSMA budget preparation • New physician out of state travel policy adopted in 2023 • Compensation comparison between OSMA and similar state societies reported to Council and compensation changed if/where OSMA is an outlier • Report to A&A and Council at every summer meeting a recap of annual meeting expenditures 	

<p>4. Engagement with local medical organizations/county societies</p>	<ul style="list-style-type: none"> • Explore engagement strategy to regularly “touch” local physician leaders, members and County society staff • Continue outreach to medical students at medical colleges • Explore opportunities for in person events at the local level 	<ul style="list-style-type: none"> • Report metrics to Council on outreach efforts to local physicians and students including attendance and engagement at these events 	
<p>5. Budget and Operations</p>	<ul style="list-style-type: none"> • Continue staff review of operational spending and report to A&A 	<ul style="list-style-type: none"> • Staff will review operational spending and report potential modification to A/A and Council annually during the budget process 	
<p>6. Annual Meeting</p>	<ul style="list-style-type: none"> • Create a Task Force to review Annual Meeting processes and how the business of the House might be accomplished in a different way 	<ul style="list-style-type: none"> • Annual Meeting Task Force created • Report on possible changes to annual meeting process submitted to Council 	

Ohio State Medical Association

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Issue Area: Engagement

Goal: OSMA will continue the new implementations and evaluation of the recent redesign of its member and public-facing brand awareness and marketing strategies through multiple communication channels.

Objective	Action Steps	Success Indicators	Accomplishments
<p>1. Implementation of <i>Approach Marketing</i> strategies for marketing-specific goals, brand image quality, and communication opportunities/victories</p>	<ul style="list-style-type: none"> • Continue our coordinated marketing/communications campaigns • Develop additional communication touchpoints for OSMA leaders to reach out to members (regular updated power points) • Evaluate the effectiveness of how the OSMA Corporate Partner/Sponsor program is communicated and implemented (<i>also within Sustainability section/plans</i>) • Evaluate the effectiveness of how the OSMA Mentorship program is communicated and implemented 	<ul style="list-style-type: none"> • Evaluate feedback from OSMA leaders and ambassadors regarding communications and report proposed modifications/changes to Council at each meeting • Increase corporate support by 20% annually (listed in resiliency and growth) • Annually review corporate sponsor and vendor partners - Add/subtract from partnerships based on value and use (listed in resiliency and growth) • Measure continued growth and participation in Mentorship program (details listed in resiliency and growth) 	

<p>2. Further build and improve public awareness and perception of OSMA brand identity</p>	<ul style="list-style-type: none"> • Build on the OSMA ambassador program (every leader communicates the messages) • Recruit additional ambassadors • Encourage all ambassadors and leaders to be more engaged and do outreach • Create more training for ambassadors • Increase our accounts with our social media platforms beyond Facebook • Develop public and member forums open to the public (for member recruitment) for networking and information sharing; in-person and virtual events, i.e. centered around: <ul style="list-style-type: none"> ○ CARE ○ Boot camp ○ Medical school visits ○ Hospital speaking engagements ○ Top Tier group visits • Expand ambassadors program across a variety of areas • Utilize ambassadors as key voices at public/in-person and virtual forums or for networking event introductions. • Continue to leverage outreach opportunities of press conferences, PR campaigns, and partnership initiatives to further amplify OSMA messaging, impact and news 	<ul style="list-style-type: none"> • Measure number of new ambassadors recruited as well as the degree of their participation in OSMA messaging - Increase participation by at least 20 individuals in 2023 • Increase by 10% annually the amount of ambassador participation and engagement at OSMA events (virtually and in person) • Evaluate whether this goal's action steps are helping to create further membership recruitment opportunities – track and report on membership join rates related to each activity when possible • OSMA accounts on additional social media platforms created and engagement increased • In 2023 increase activity on Twitter and Instagram • Forums developed and implemented to address OSMA public health and advocacy efforts focused on the audiences listed • Document use of ambassadors for specific OSMA programming • Track number of and assess impact of PR initiatives – report to Council 	
<p>3. Expand data reporting on communications tools and implement data-driven analyses of audience</p>	<ul style="list-style-type: none"> • Continue to gather monthly data reports within Approach's data dashboard relative to email 	<ul style="list-style-type: none"> • Compare monthly numbers to previous months and prior year 	

<p>behaviors to further optimize communication strategies and targeting</p>	<p>bulletins sent, social media, and website analytics</p> <ul style="list-style-type: none"> • Evaluate the data’s insight on audience reach and engagement to help plan campaigns and effective content • Strategize further audience targeting potential to best focus on concise messaging that is most relevant within each communication channel 	<ul style="list-style-type: none"> • Measure rise in audience engagement with goal of 5% improvement in engagement year over year 	
<p>4. Evolve and improve how content is generated and voiced from OSMA for all communication messaging and channels including more regular communications from OSMA sections</p>	<ul style="list-style-type: none"> • Further utilize members and medical community to spark effective messaging goals • Collect list of content leaders and further engage with them to provide relevant content important to their practices and the medical community • Plan section e-bulletins throughout the year. Coordinate with section chairs to develop content and send e-bulletins to section members on a regular basis (3-4 times/year) • Continue to gather and utilize Member spotlights—even those not identified as member leaders • Continue to address how we communicate more than just how our advocacy efforts “avoid the negatives” and bring out positive messaging • Utilize member/medical community-driven content within monthly email themes, Ohio Medicine, and key social posts 	<ul style="list-style-type: none"> • Track content and content topic ideas initiated or submitted from members/medical community • Continue tracking the membership solidifications of each section—and web analytics to their respective join forms online • Generate at least one member spotlight monthly to be used in all communications • Highlight at least one public health or pro physician issue or member “good work/award” on a monthly basis in at least one communication 	
<p>5. Manage misinformation and public health information</p>	<ul style="list-style-type: none"> • General public health information – appropriate level for general public consumption 	<ul style="list-style-type: none"> • See success indicator in healthier Ohio #5 	