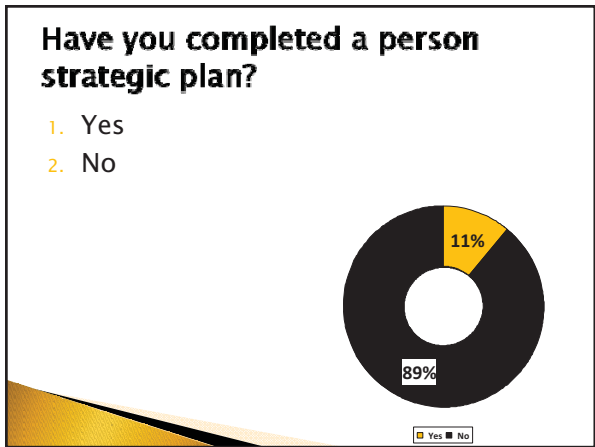
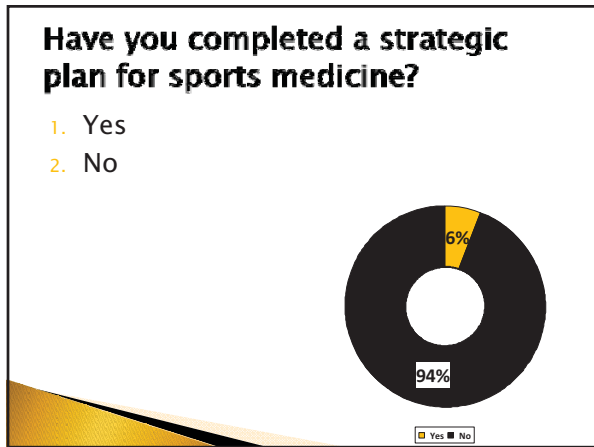


Strategic Planning for College Sports Medicine

- ## Strategic Planning Disclaimer
- ▶ I'm not a perfect planner but a life long learner.
 - ▶ I would absolutely do some things differently if I could do things over.
 - ▶ Things change: mission, goals, circumstances
 - Secret Service Mission
 - ▶ This presentation / discussion will change



Introduction into Strategic Planning

▶▶ 10 Step Process for Improving the Day to Day.....

- ## Why Strategic Planning?
- ▶ Athletics and therefore Sports Medicine is a business
 - ▶ Traditional Methods of "Improving the Day to Day Haven't Worked"
 - ▶ Inspires others about the department as it operates today and where it is headed
 - ▶ Identifying Areas of A, B, or C that one individual would not pick-up on
 - ▶ Communication vehicle for the mission, vision, values and long-term objectives
 - ▶ Validating Your Worth

Personal Experience with Strategic Planning

» Not by choice!

Benefits of Strategic Planning

- ▶ 1. Clearly **define the purpose** of the organization and to **establish realistic goals and objectives** consistent with that mission in a defined time frame within the organization's capacity for implementation.
- ▶ 2. Communicate those goals and objectives to the organization's constituents.
- ▶ 3. Develop a sense of ownership of the plan.
- ▶ 4. Ensure the most effective use is made of the organization's resources by focusing the resources on the key priorities.
- ▶ 5. Provide a base from which progress can be measured and establish a mechanism for informed change when needed.
- ▶ 6. Bring together of everyone's best and most reasoned efforts have important value in building a consensus about where an organization is going.

Other reasons to include strategic planning:

- ▶ 7. Provides clearer focus of organization, producing more efficiency and effectiveness
- ▶ 8. Bridges staff and administration
- ▶ 9. Builds strong teams in the administration and the staff
- ▶ 10. Provides the glue that keeps the team together
- ▶ 11. Produces great satisfaction among planners around a common vision
- ▶ 12. Increases productivity from increased efficiency and effectiveness
- ▶ 13. Solves major problems

10 Steps to Successful Strategic Planning

- ▶ 1: Laying the Foundation
- ▶ 2: Scanning the Environment
- ▶ 3: Collecting Relevant Data
- ▶ 4: Analyzing the Collected Data
- ▶ 5: Stating Mission, Vision and Values
- ▶ 6: Prioritizing Needs and Identifying Risk
- ▶ 7: Designing and Validating Tactics
- ▶ 8: Prioritizing Tactics and Resources
- ▶ 9: Documenting and Communicating the Plan
- ▶ 10: Maintaining the Plan

Step 1: Laying the Foundation

» Getting Started with the Process or Planning for Planning

Defining the Scope

- ▶ What outcomes are desired as a result of the strategic planning process?
- ▶ What results do we really want to receive?
- ▶ Strategic Planning is not a reaction to the environment but an attempt to shape the future.
- ▶ Using Information you have on hand will help determine priorities that will shape your department into the program you want it to be.

Proactive people take the initiative and responsibility to make things happen. They cause action rather than being victims of circumstance.

» Chris MacAllister

Planning Outcomes, Goals and Objectives (OGO)

- ▶ What is the difference between outcomes, goals and objectives?
 - Objectives are measurable
- ▶ Important to compare OGO to Athletic Department / University OGO
- ▶ No more than 10 outcomes in a Strategic Plan
- ▶ Doing this early in the process will build ownership and buy in at 360 degrees.
- ▶ Think like a CEO.

Prioritize Outcomes

- ▶ How broad is the impact of this outcome? Will it effect the entire organization? Will it improve the way in which we provide health care to student athletes?
- ▶ If we don't do this "now" what will happen? Can this wait a couple of years?
- ▶ What is the financial impact of not addressing these OGOs now? Is this an opportunity that will save us money?
- ▶ Will it enrich or make associates lives better to ensure retention of quality people?

Personal: Outcomes, Goals and Objectives

Outcomes	Goals	Objectives
To have a plan to be healthier	To exercise more	1. To exercise 4x per week for a minimum of 45 minutes per session
To have a plan that enables more time with family	To set aside time to spend	1. To eat 5 meals per week at the dining room table 2. To have a scheduled date night once per week
To have a plan to become more active in the community	To increase my volunteer time	To volunteer 5 hours per month at a charity organization
???	???	???

Sports Medicine: Outcomes, Goals and Objectives

Outcome	Goals	Objectives
To have a plan to improve event coverage	To increase the event coverage percentage	To increase the events covered by 25% within 3 years
To have a plan to improve working conditions of staff athletic trainers	To improve the hours and number of sports ATCs are working with	To increase the percentage of AMCIA to 80% of recommendation by Aug 2014
To have a plan to control insurance cost of student athlete health care	To decrease insurance cost	1. To reduce cost to \$.20 per \$1 of billed charges within 3 years 2. To reduce health care cost by 15% within 3 years
To have a plan to reduce risk via medical documentation	To improve the documentation of injuries, tx / rehab, referrals	1. To have 98% of all documented injuries have a discharge note in 2010-11 2. To document 100% of treatments within 24 hours

Outcomes, Goals and Objectives

Outcomes	Goals	Objectives
To have a plan to provide a quality rehabilitative experience	To have a dedicated rehabilitative experience for all time loss injuries	1. To schedule 100% of time loss injuries for rehab. appointments 2. To have no more than a 2:1 ratio of SA to clinician for all rehabilitative sessions
???	???	???
???	???	???
???	???	???

Determining the Timeline

- ▶ How long is this going to take and is it worth my time?
- ▶ Factors:
 - Size of Department / People Involved
 - Complexity of Department
 - Athletics vs. Internal Operations vs. Sports Medicine
 - Success rate of Strategic Planning
 - Has someone had a positive outcome within the group?
 - Availability and Accessibility of Information
 - What information?
 - What information do we have and what information can we get?
 - State of the department: running well or turmoil
 - Resource Availability
 - Approval and Sign-off Required

Identifying Key Participants (Advocates)

- ▶ Customers
 - End User
- ▶ Stakeholders
 - Employees
 - Owner
- ▶ Business Partners
 - Distributors
- ▶ Sponsor
 - Manager
- ▶ Customers
 - Student Athletes
 - Coaches?
- ▶ Stakeholders
 - Athletic Trainers
- ▶ Business Partners
 - Student Health
 - Team Physicians
 - S&C Coaches
- ▶ Sponsor
 - Athletic Director
 - Assistant AD

Business

Sports Medicine


Participants List

▶ Head Athletic Trainer	▶ Financial Representative
▶ Assistant Athletic Trainers	▶ Athletic Director
▶ Student Athlete Representative (SAAC)	▶ Compliance / SWA
▶ Student Health Director	▶ Coach
▶ Team Physician (s)	▶ S&C Coach
	▶ Risk Manager
	▶ External Reviewer / Consultant

Who and how do you organize these people?

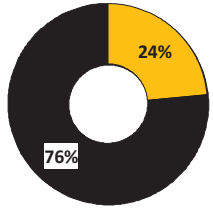
Mapping Advocacy

- ▶ Identify, Clarify and Validate the Benefits of a Strategic Plan
- ▶ Determine if Resistance and How to Overcome
- ▶ Evaluate your presence as a leader
- ▶ Begin building and understanding of what it will take to build commitment, support and ownership of the planning process.



Would you feel comfortable leading a strategic planning session?

1. Yes
2. No



Response	Percentage
Yes	76%
No	24%

Step 2: Scanning the Environment

»» What's out there?

Benefits of Scanning the Environment

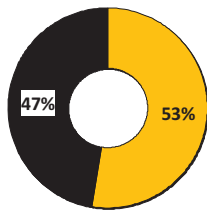
- ▶ Better Understanding of SWOT (Strengths, Weaknesses, Opportunities, and Threats)
- ▶ Kicking off strategic plan development
- ▶ Building the project plan
- ▶ Collecting Information
- ▶ Conducting SWOT
- ▶ Identifying the organization's / department's drivers
- ▶ Crafting Questions

Strategic Planning Kickoff Meeting

- ▶ Present the benefits of strategic planning – developing ownership / commitment
- ▶ Presents “drafts” of OGO as you know them to be a this point
- ▶ Assign roles and responsibilities for data collection
- ▶ To identify a timeline for data collection and reporting
- ▶ Have off-site
- ▶ 1–2 days

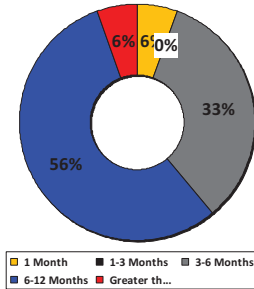
Do you believe your institution would be in favor of a sports medicine strategic planning session?

1. Yes
2. No



How long do you think it would take to develop a strategic plan?

1. 1 Month
2. 1–3 Months
3. 3–6 Months
4. 6–12 Months
5. Greater than 1 Year



Collecting Information

- ▶ Identifying Best Practices
- ▶ SWOT Analysis
- ▶ Analyzing Organizational Structure
- ▶ Financial Analysis
- ▶ Perception
 - Student Athlete
 - Coach
 - Other Support Personnel
- ▶ Employee Perception
 - Staff Evaluations / Employee Satisfaction Surveys

SWOT Analysis

- ▶ Be realistic
- ▶ Don't over-think – just say what first comes to mind
- ▶ Think “organization today and where it should be tomorrow” – don't dwell on past

How do you identify best practices?

- ▶ NCAA Sports Medicine Handbook
- ▶ NATA and other Position Statements
- ▶ Other Universities
- ▶ Peer Reviewed Articles
- ▶ Case Law
- ▶ Staff Interest and Knowledge
 - Team Physician

- ▶ How do you determine the standard of care for your student athletes?

Step 3: Collecting Data

» Information is Key

Data Collection

- ▶ Yikes
- ▶ Ugh!
- ▶ The thought of “data collection” doesn’t make strategic planning something that I want to be a part of.
- ▶ “I would rather be implementing change vs. collection information.”

Where do we start?

- ▶ Begin with SWAT Analysis and Validate those Subjective Statements
- ▶ What information do you have on hand?
 - Injury Information
 - Your School vs. ISS Information
 - Tx / Rehab / Referrals
 - Financial
 - Budget
 - Health Care Cost / Insurance
 - Employee
 - Annual Reviews
 - Satisfaction
 - Timecards
 - AMCIA
 - Event Information

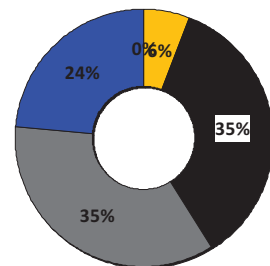
How do we collect this information?
How do we use it?

Downfalls with Data Collection

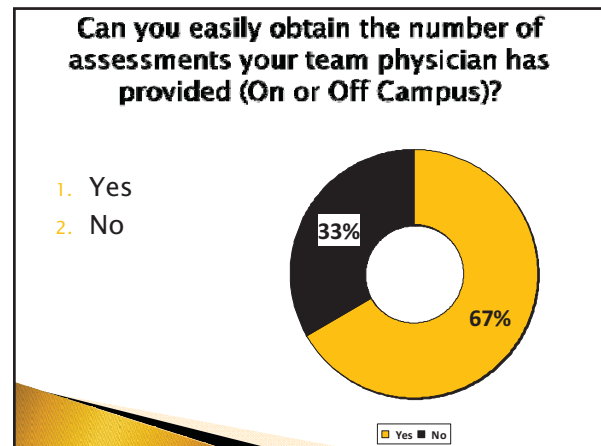
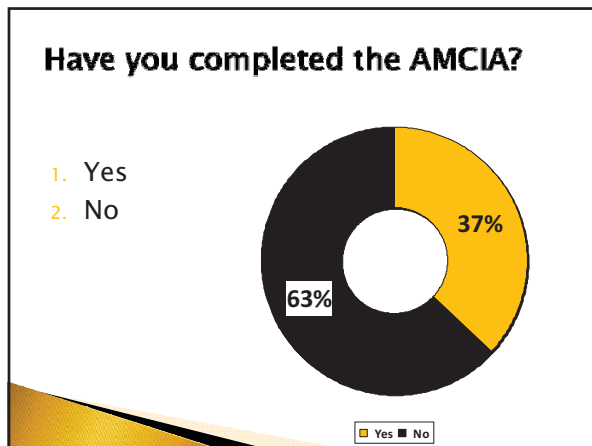
- ▶ Validity of Our Information???
- ▶ If we need to have better data is this going to delay our strategic planning process a year?
- ▶ What information can we look at in a short turn around?
 - Employee Annual Reviews and Satisfaction
 - AMCIA
 - Comparisons with Other Institutions
 - Best Practices
 - Perception Surveys
- ▶ Longer Data Collection
 - Injury / Tx or Rehab / Referrals
 - Event Coverage Projects

How effective would your current Injury documentation process be in strategic planning?

1. A
2. B
3. C
4. D
5. F



Legend: A B C D F



- ### Methods of Collecting
- ▶ Injury Management Software
 - ▶ Calendar / Scheduling
 - ▶ Surveys
 - Student Athlete Perceptions of Health Care (Coaches)
 - Programmatic Evaluations
 - ▶ Interviews
 - Student Athletes & Coaches
 - Sports Medicine Staff (Team Physician)
 - ▶ Outside Consultants

- ### Questions to Consider
- ▶ How long?
 - ▶ How much \$\$\$\$ to collect?
 - ▶ Will all the data collection pieces provide us the information we need to make decisions about the program?

Step 4: Analyzing Data

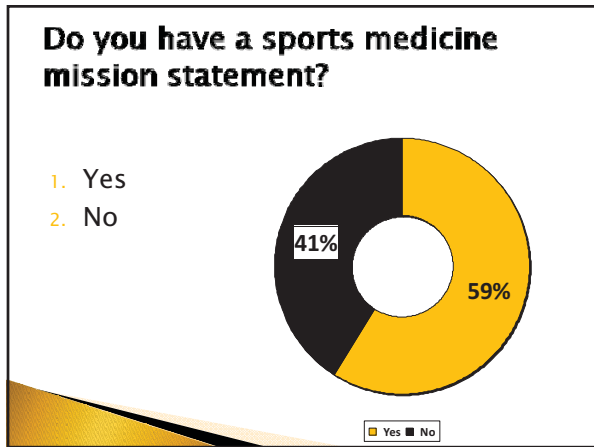
» If your going to collect it, who is going to review?

- ### Questions to Consider
- ▶ Is this a team, group or individual effort?
 - ▶ What information can we share with a large group?
 - Any information that is protected?
 - Employee Records
 - Health Records
 - ▶ Was the timeframe that this information was collected, "Normal"?
 - High Injury Rates
 - Family Leave / Staff Shortages

Step 5: Stating Mission, Vision and Values


» Why so late?

- ### Mission Statment
- ▶ The reason the organization / department exist
 - ▶ Who the organization serves
 - ▶ The value of the organization / department to others
 - ▶ Concise and direct
 - ▶ Rarely needs updating unless major change



- ### Mission Statements
- ▶ “Living”
 - ▶ Helps planning processes determine the actual needs.

Mission Statement



The mission of the University of Maryland Sports Medicine Unit is to provide first-class, comprehensive, and state-of-the-art health care and wellness services as it pertains to the well-being of University of Maryland student-athletes.

- ### Mission Statement
- ▶ **The following guiding principles will be embraced by University of Maryland Sports Medicine Unit in achieving our mission:**
 - Providing professional leadership and counseling to student-athletes.
 - Participating in the development of the student-athlete's health and well-being.
 - Serving as a major intellectual and creative resource for the University of Maryland Department of Intercollegiate Athletics.
 - Developing interactive partnerships with the campus community and area allied health professionals.
 - Consistently providing a high-level of customer care and service.
 - Maintaining fiscal and operational integrity through sound management practices.
 - Functioning at high levels of accountability and productivity in all initiatives, programs, and operations.
 - Promoting character development, leadership and sportsmanship.
 - Supporting the mission, goals, and objectives of the Department of Intercollegiate Athletics and the University as a whole.
- 

Vision Statement

- Idealistic and Inspirational
- Remains current for only 2 – 4 years
- Future Direction
- What will the department look like with planning is complete?
- Department's message in realistic and credible terms consistent with its mission and values

Values

- Define how staff behave
- Reflect the personal values of those involved in the department
- Traits, Behaviors, or Qualities that typify a department's actions
- Drive Company Decisions

Creating the MVV

- Brainstorming Meeting
- Small Group / Individual Exercises with Large Group Presentations
- Don't evaluate your ideas -just get them out of your head and on a white board
- Everyone should participate

- Head Athletic Trainer writes them

Step 6: Prioritizing Needs and Identifying Risk

‣‣ Risk Management???

Prioritizing and Identifying Risk

- What has the greatest impact and contribution to the Mission?
- Every organization, and every strategy has resource limitations.
 - Financial
 - Human Resources
 - Time
- Identify what OGO you should pursue
- Identify what OGO you should delay
- Risk are a part of all organizations

Step 7: Designing and Validating Tactics

‣‣ The Fun Stuff

Tactics

- ▶ Activities you select to obtain the results you want
 - Confirming OGO
- ▶ The meat of the strategic plan
- ▶ Identify the expected results for each tactic and document their outcome (hopefully to validate your efforts and successes)
 - Increased efforts in scheduling dedicated rehabilitation experience yield increased perception of health care
 - Increased effort in adjusting primary care physicians yielded lower insurance cost per dollar of healthcare
- ▶ Do the tactics meet:
 - Mission
 - OGO
 - Measurable Results

Step 8: Prioritizing Tactics and Resources

»

Prioritizing Tactics

- ▶ What works at one institution may not even be a possibility at another
 - Why not be part of their mission, resources, etc.,
- ▶ What are we going to start first?
- ▶ What is our implantation timeline?
 - EAPs, Concussion Protocol, Drug Testing Protocol, Sickle Cell Testing Program, Staff Monthly Journal Club Program, Disordered Eating Program, Cost-Containment Measures

Step 9: Documentation and Communicating the Plan

» Implementation Process

Documentation and Communication

- ▶ Getting the information out, educated and implemented
- ▶ Results may come in stages, therefore how are items distributed and followed up with
- ▶ Policy and Procedure Development

Step 10: Maintaining the Plan

» Staying Focused

Maintaining the Plan

- ▶ Its not over, Review, Review, Review
- ▶ Annual Review
 - Do the tactics meet the expected results?
 - Did they have the impact that was expected in the OGO stage.
- ▶ Other items may now take priority