



# Strategic Plan

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*Prepared by the PCRS Strategic Planning Committee*



## OVERVIEW

The Pacific Coast Reproductive Society (PCRS) strategic plan describes a desired vision and what will be essential to achieving that vision over time. It is grounded in **core ideology** and driven by an envisioned future that realizes the full potential of PCRS's ability to support its stakeholders and the profession. PCRS's commitments are articulated in **goals** that declare the outcomes or attributes the organization intends to achieve. **Objectives** represent key metrics affecting PCRS's ability to accomplish the goal and clearly state the direction in which these issues must be moved forward. **Strategies** describe how PCRS plans to commit its limited resources to make its vision a reality.

In the future, PCRS will not be able to be all things to all people, but must be different things to different people as the plan evolves to meet the needs of a constantly changing professional environment. Therefore, underlying this plan is the adoption of an ongoing process of planning and thinking strategically, designed to ensure relevance of direction and action over time.

In developing this strategic plan, a framework for planning was utilized, based on a model that organizes conversations about the future into four distinct planning "horizons". Utilization of this framework has been found to be a powerful tool. It assists organizations in prioritizing and executing outcomes as well as guaranteeing relevance of an entities long range direction.

**Envisioned future:** The "four planning horizons" framework consists of crafting a comprehensive strategic direction based on the balance between what doesn't change -the timeless principles of the organization's core purpose and core values (core ideology) -and what the PCRS seeks to become within a 10 to 30 year horizon -what would be possible beyond the restraints and realities of the current environment. The 10 to 30 year horizon is characterized by the articulation of an envisioned future, or a BAG (big audacious goal) and vivid descriptions which illustrate the advantages of achieving the BAG.

**Critical factors:** Expressing the envisioned future guides the PCRS as it considers the factors that will affect its ability to achieve goals. Building foresight about the 5 to 10 year horizon, including assumptions, opportunities and critical uncertainties in the likely relevant future as well as emerging strategic mega issues, suggests critical choices about the potential barriers the

PCRS will face. This foresight also guides the responses the organization will need to consider in navigating the way toward achievement of its BAG.

**Strategic plan and operational planning:** The linkage continues into the 3 to 5 year horizon through the development of a formal long-range strategic plan in which the PCRS clearly articulates the outcomes it seeks to achieve for its stakeholders. How will the world be different as a result of what the PCRS does? Who will benefit and what will be the most likely results? Further, the clear identification of strategies will bring focus to PCRS's annual operational allocation of resources. Action plans, checkpoints and milestones will be created through a process of operational preparation. Periodic progress reports, a strategic plan dashboard, will clearly indicate PCRS's progress towards each goal in a 12 month planning cycle.

A strategic long-range plan is not intended as a substitute for an annual program of work or operating blueprint. It does not necessarily detail all the initiatives, programs and activities the PCRS will undertake in the course of serving its membership and the profession, nor can it foretell changes to the underlying assumptions on which key strategic choices were based. Instead, the strategic plan identifies what the PCRS is not doing today but must address in the future to maximize the potential for success. Consequently, the strategic plan is a catalyst for change, doing new things or doing more or less of current activities to ensure successful outcomes.

**Ongoing Re-evaluation:** Strategic planning for PCRS should become the methodology for operation of the organization. If successful, this process will not have yielded a plan to be placed on a shelf, but have served as a catalyst for the "process of planning strategically", at all times and at every level throughout the PCRS. In order to attain its vision, the PCRS must not look at strategic long-range planning as a one-time project that merely produces a milestone document of its best thinking at the moment. It is essential that PCRS adopt strategic planning as an operational philosophy of on-going re-evaluation of critical knowledge bases that illuminate parameters for its working environment, including:

- Sensitivity to member needs and expectations, insight into the future of the profession.
- Understanding of the capacity and strategic position of the PCRS.
- Effective analysis of the ethical implications of policy and program choices.

PCRS's strategic long-range plan represents a compass for the organization to use in order to guide its work over the next five years. Each year of its life, the plan will be updated based on the experience or new circumstances in addition to emerging opportunities and challenges. In 2012, PCRS should author new 3

to 5 year goals, objectives and strategies based on an altered environment expected to exist in a rapidly changing global community.

## 10 - 30 Year Planning Horizon Core Ideology & Envisioned Future

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

**Envisioned future** conveys a concrete, but yet unrealized, vision for the PCRS. It consists of a **big audacious goal** - a clear and compelling catalyst that serves as a focal point for effort and **vivid descriptions** - vibrant and engaging descriptions of what it will be like to achieve the big audacious goal.

### CORE IDEOLOGY

#### Core Purpose:

PCRS is a global, interactive organization that champions the field of reproductive medicine.

#### Cores Values: We believe in...

1. Cutting edge science and technology
2. Being supportive, including development of new research
3. Innovation
4. Inclusiveness
5. Collegiality
6. Creativity
7. Being non-competitive
8. Promotion of best practices
9. Professional development
10. Intimacy

## Strategic Principles

*Strategic principles* provide the foundation for sound, consistent values-based decision making in order to maintain a member-centric organization which provides tangible benefits to all stakeholders and contributes in substantial measure to individual success and the profession at-large.

### What We Offer:

- State of the art continuing medical education
- Dissemination of valuable information
- Professional Guidance by defining standards of care
- One-stop shopping for new technology
- Integrated learning
- Personal interaction with global thought leaders

### What We Must Do:

Consistently deliver value, Annual Meeting

Cutting edge communication vehicles, website, newsletter, BOD, Annual Meeting

Subject matter expertise, Code of Ethics, core competencies

Exhibits, sponsors, workshops

Mentoring program, Website (e-learning, blogs, research library, case studies, testimonials, white papers)

Leadership development, strategic alliances, annual meeting

## Value Proposition

***Member intimacy*** has been established as PCRS's **value proposition**. The following differentiation statements are key elements in establishing PCRS's unique position with its members in the reproductive medicine profession.

- PCRS builds intimate, inclusive relationships with its members by meeting and exceeding their expectations.
- PCRS will be acknowledged as an authority in defining the reproductive medicine career path for its members from both the education and leadership development standpoints.
- PCRS establishes a reputation as a credible resource and innovator for reproductive medicine knowledge, trends and practice.

## Envisioned Future

### Big Audacious Goal

To be the premier, globally recognized organization that promotes leadership, scientific excellence, best practices and innovation in reproductive medicine within a collegial, relaxed, and non-threatening environment.\*

### Vivid Descriptions

- Fellowship program directors will require their fellows to present at the PCRS annual meeting.
- Greater majority of leading reproductive medicine practitioners in the United States will be PCRS members.
- PCRS members will be leaders in all segments of reproductive medicine.
- PCRS will provide the platform for delivery of groundbreaking clinical research.
- PCRS will be a springboard for the future leaders in reproductive medicine.
- Professionals from diverse backgrounds will have unlimited opportunities and desire to champion the art, science and practice of reproductive medicine through the PCRS.
- PCRS will be the preferred networking forum for reproductive medicine specialists.
- PCRS will achieve and maintain the highest level of accreditation.



## 5 to 10 Year Planning Horizon Assumptions About the Future

*Assumption statements will help PCRS purposefully update the strategic plan on an annual basis. PCRS's projected future environment is described in this section. When conditions change, strategy needs to be adjusted. An annual review of these assumptions will help the Society ensure the ongoing relevance of its strategy.*

### FUTURE SCENARIO - 2027

#### How will PCRS be enhanced and different in 2027?

- An ongoing effort will be made to diversify income sources and reduce reliance on industry.
- Professional development will be expanded to include other educational opportunities in addition to the Annual Meeting.
- PCRS will be vigilant about conducting analysis of member trends to consistently enhance the overall organizational value proposition.
- The Society will further refine its niche and focus to remain relevant and beneficial to the membership.
- Leadership development and growth will be built around career paths.
- PCRS will continue to demonstrate subject matter expertise and thought leadership in reproductive medicine by addressing developing trends and research in the areas of genetics, practice management and all areas impacting the profession.
- It will maintain financial viability with appropriate reserves and demonstrated non-dues revenue expertise.
- The PCRS brand will be further strengthened and widely respected on a number of levels.
- The Society will continue to develop technological expertise and savvy.
- PCRS will continue to be appreciated for providing an intimate, collegial and secure environment for all stakeholders.

## **5 Year Planning Horizon Outcome Oriented Goals**

Goals are outcome-oriented statements that represent what will constitute PCRS's future success. The achievement of each goal will move PCRS towards the realization of its vision. The goals are not in any order of priority. Every goal will need to be accomplished if the organization is to fully realize the desired and stated future state.

On the following pages, each goal is accompanied by (a) objectives, which represent key issues affecting PCRS's ability to achieve the goal and (b) corresponding strategies which articulate milestones against which to measure progress in more specific terms.

### **Goal #1 - Professional Development**

PCRS will be the key provider of superior opportunities for life long learning and establish career path in reproductive medicine.

### **Goal #2 - Networking Opportunities**

PCRS will consistently enhance and expand networking opportunities for its membership.

### **Goal #3 - Thought Leadership**

The PCRS will be recognized as subject matter experts that consistently foster advancement in the field of reproductive medicine.

### **Goal #4 - Leadership Development**

PCRS will further develop and maintain inclusive, diverse communities of members to nurture future leaders for both the Society and the profession at-large.

### **Goal #5 - Financial Viability**

PCRS will continue to be financially viable so it can achieve and further enhance core functions in order to maximize overall effectiveness, impact and member value.

### **Goal #6 - Brand & Image**

All fertility specialists and society at-large will recognize PCRS as a global leader in the dissemination of cutting edge reproductive medicine education and information.

### **Goal #7 - Governance**

PCRS will clearly identify, define, clarify and communicate the governing principles and structure of the Society.

## **GOAL #1 - PROFESSIONAL DEVELOPMENT**

*PCRS will be a key provider of superior opportunities for life-long learning and clearly delineate career paths in reproductive medicine.*

### **Objectives:**

1. Add value to PCRS membership by delivering compelling, informed and cutting edge reproductive medicine education.
2. Ensure that state of the art reproductive medicine is an integral part of the Annual Meeting and any other educational offering programs
3. Provide mentorship in the field of reproductive medicine for members, fellows and residents.
4. Identify, support and disseminate advances in reproductive medicine.
5. Assist in directing fellows and members to identify job opportunities.

### **Strategies:**

1. Revisit the possibility of working with Canadian Fertility Association to facilitate a SREI and PCRS paper exchange at their respective Annual Meetings.
2. Create a library of accepted abstracts and orals from Annual Meetings and make available to the membership on the website.
3. Establish a reference library of guest lectures and power point presentations for member access on the website.
4. Upload keynote, priority landmark speaker lecture videos on website which do not qualify for CME credits.
5. Identify and upload keynote, priority landmark speaker lecture videos on website which carry CME credits.
6. Develop additional educational opportunities in addition to the Annual Meeting including a pilot program for a one-day regional meeting in either the Los Angeles or San Francisco areas.
7. Collaborate with ASRM to develop cutting edge webinars on embryology and genetics featuring the foremost subject matter experts.
8. Specifically address developing trends and development in the areas of genetics and practice management at the Annual Meeting.
9. Develop web-based accredited course work.

## **GOAL #2 - NETWORKING**

*PCRS will consistently enhance and expand networking opportunities for the membership.*

### **Objectives:**

1. Improve communications and interactions between members at the Annual Meeting.
2. Expand communications and interactions between members outside of the Annual Meeting.

### **Strategies:**

1. Introduce all PCRS Board members and key Committee Chairs during the Welcoming Reception at the Annual Meeting.
2. Email first time attendees prior to the Annual Meeting with a complete list of networking opportunities to encourage early interaction and throughout the entire proceedings.
3. Expand networking opportunities for fellows and the membership at-large during the Annual Meeting.
4. Reevaluate holding the nurses and genetic counselor reception earlier during the Annual Meeting following the 2018 event.
5. Actively solicit and post job opportunities on the PCRS website.
6. Introduce and establish basecamp as a viable membership tool and point of difference for PCRS members.
7. Identify and implement means of improving and expanding networking opportunities between members and sponsors.
8. Research improving and enhancing the capabilities of the members only section on the website to add overall value.

## **GOAL #3 - THOUGHT LEADERSHIP**

*PCRS will be recognized as subject matter experts that consistently foster advancement in the field of reproductive medicine.*

### **Objectives:**

1. Clearly identify emerging new ideas and changing and/or developing trends in reproductive medicine.
2. Continue attracting top leaders and experts from academia, industry and clinical medicine to participate in the Annual Meeting and any new educational opportunities.
3. Actively promote PCRS members as subject matter experts in reproductive medicine.
4. Consistently support reproductive medicine research and development.

### **Strategies:**

1. Survey members to identify new and emerging trends in reproductive medicine.
2. Establish dedicated time at each Board of Directors meeting to share and discuss new and emerging trends in reproductive medicine.
3. Add new ideas (emerging trends) in reproductive medicine project to basecamp.
4. Ensure that Program Committee, now and in the future, continue to address new and emerging trends in Annual Meeting content/presentations. Formalize program committee oversight to track long term strategy and development.
5. Establish a pipeline to the PCRS office for information about individual membership accomplishments in order to promote same on the website thereby increasing awareness of contributions made by members and the Society at-large.
6. Make ongoing effort to keep abstract and award criteria current to identify new and emerging trends in research.
7. Explore the potential to secure more cutting edge abstracts by increasing monetary amount of awards and overall recognition.
8. Offer Saturday session during the Annual Meeting for researchers and interested PCRS attendees to engage in an interactive session and promote cross over communication between the two entities. Researchers will update clinicians on current projects and allow for questions, feedback and input on any given developing subject matter.

## **GOAL #4 - LEADERSHIP DEVELOPMENT**

*PCRS will create inclusive, diverse communities of members to develop future leaders for both the Society and the profession.*

### **Objectives:**

1. Develop and communicate a clear, rewarding and beneficial leadership track for all PCRS members.
2. Continue enhancing greater fellow participation at the Annual Meeting.
3. Consistently work to strengthen relationships with Fellowship Directors.

### **Strategies:**

1. Update and refine organizational chart to clearly define leadership role opportunities.
2. Activate all standing committees as per current policy with clearly defined roles, expectations, timetables for deliverables and the ability to report progress on a timely and ongoing basis.
3. Appoint Board member as a liaison to each committee to serve as a direct source of information to the Board of Directors.
4. Ensure a beneficial blend of senior and younger members on all committees.
5. Offer committee membership and abstract review access to fellows.
6. Create greater accountability for all elected leaders and members participating in the committee system.
7. Utilize basecamp for all committee activities.

## **GOAL #5 - FINANCIAL VIABILITY**

*PCRS will continue to be financially viable so it can achieve and enhance core functions in order to maximize overall effectiveness, impact and member value.*

### **Objectives:**

1. Continue building revenues with special emphasis on diversifying income streams.
2. Maintain expense levels under 86 per cent of revenue.
3. Establish an educational endowment fund, separate from the scholarship endowment fund. These would be unrestricted grants that the Board of Directors would have the discretion to disperse.
4. Recognize the value of compounded interest on overall fund growth.

### **Strategies:**

1. Future budget proposals should be designed to limit expenses to 86% or less of projected budget revenues.
2. Develop a marketing plan for the educational endowment fund specifically targeting both members and industry.
3. Clearly identify and consistently communicate levels of sponsorship and member financial contributions by means of, but not limited to, the Annual Meeting program and signage, the Awards Dinner and the PCRS website.
4. Actively market the benefits and return on investment which can be derived from being sponsorship donors.
5. Educate the Board of Directors on the financial wisdom of having reserves that are invested over the long term and not expended on special projects.
6. Set limits in policy regarding reserves minimums and the approval process for spending of any reserve funds.
7. Identify sponsors to underwrite the cost of the pilot regional meeting concept sometime in 2019.

## **GOAL #6 - BRAND & IMAGE**

*All fertility specialists and society at-large will recognize PCRS as a global leader in the dissemination of reproductive medicine education and information.*

### **Objectives:**

1. The Society will continue to enjoy a reputation for fostering and providing an intimate, collegial and non-competitive culture in a relaxed atmosphere.
2. PCRS remains a respected authority and credible resource on the dissemination of cutting edge information on reproductive medicine.
3. The PCRS Annual Meeting will be recognized as the premier reproductive medicine education and professional growth experience. Content will remain well vetted and filtered to identify and provide the most relevant and timely topics. It will be an elite forum for the “cream of the crop” in the field.
4. The Society actively fosters long term relationships.
5. PCRS will explore means and methods of expanding its influence and reputation by diversifying its offerings and enhancing overall member value.

### **Strategies:**

1. Compile and study demographic data to ascertain target audience, paying particular attention to the 35 to 50 year old practitioners. Make any necessary adjustments to keep such individuals engaged and loyal to PCRS.
2. Continue to provide an excellent, well vetted, relevant and cutting edge Annual Meeting which is deemed an elite, well produced experience.
3. Share demographic findings and all information on developing and new trends with Program Planning Committee to ensure that content reflects cutting edge knowledge.
4. Ensure that there is some overlap in Program Committee membership to provide historical perspective and continuity in terms of strategically planning professional development for a profession which continues to evolve and can demonstrate the ability to anticipate needs three to four years ahead of the current environment.
5. Improve and enhance the PCRS website to better reflect and support the Society’s brand and image.
6. A post conference assessment will be provided by SBI with recommendations to further enhance the Annual Meeting along with other recommendations for improving the overall member experience



and the PCRS brand/image to follow at next year's Strategic Planning Committee retreat.

## **GOAL #7 - GOVERNANCE**

*PCRS will clearly identify, define, clarify and communicate the governing principles and structure of the Society.*

**\* ESSENTIAL TO ADDRESS IN 2018 DURING TRANSFER OF MANAAGEMENT**

### **Objectives:**

1. \*Thoroughly evaluate organizational structure and governance of PCRS in order to ensure that it is reasonable, nimble and streamlined taking into account inclusivity, accessibility, member centricity and diversity. Update as deemed necessary to maintain flexibility and relevance.
2. \*Maintain a sharp focus on consummating a successful transition to the new management team and clearly delineate areas of responsibility.

### **Strategies:**

1. \*Conduct an analysis of the Board book and policies in general to make certain each aligns with the desire to be reasonable, streamlined and nimble, paying particular attention to accountability and expectations.
2. \*Include SBI in Strategic Planning process, the Annual Meeting, ASRM activities, three Board Meetings and Nominating Committee activity as well as providing program planning updates.
3. \*Review questions and issues developing from the transition on a monthly basis.
4. \*Butler Associates and SBI will closely coordinate efforts to maximize preparedness for 2018-2019 and complete the transfer of property along with executing the final phases of the transition including the transfer of financial responsibilities.
5. \*Identify 2018-2019 committee chairs as early as possible in order to solidify ongoing organizational structure and identify future leaders.
6. \*Build more institutional memory into the Board of Directors and leadership in general, including the committees.
7. \*Hold Spring 2018 Board of Directors Orientation and the 2018 Strategic Planning Committee Retreat at SBI offices in Seattle.
8. \*Address leadership development through governance to memorialize process and widely communicate same.