

**Annotated 8/28/2012**



**Pacific Coast Reproductive Society  
Strategic Plan**

**September 14, 2007**

*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' ability to support its stakeholders and the profession. PCRS' commitments are articulated in **goals** that declare the outcomes or attributes the organization intends to achieve. **Objectives** represent key metrics affecting PCRS' 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' 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' 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' strategic long- range plan represents a compass for the organization to use in order to guide it 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' consistent identity that transcends all changes related to its relevant environment. Core ideology consists of two components: **core purpose** –the PCRS' 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. Being supportive
2. Innovation
3. Inclusiveness
4. Collegiality
5. Continuing medical education and professional development
6. 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

#### **What We Must Do:**

Consistently deliver value,  
Annual Meeting

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

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• Professional Guidance by defining standards of care.</li> </ul> | <p>Subject matter expertise,<br/>Code of Ethics, core competencies</p>  |
| <ul style="list-style-type: none"> <li>• One-stop shopping for new technology</li> </ul>                 | <p>Exhibits, sponsors, workshops</p>  |
| <ul style="list-style-type: none"> <li>• Integrated learning</li> </ul>                                  | <p>Mentoring program,<br/>Website (e-learning),<br/>Blogs, research library,<br/>Case studies,<br/>Testimonials, white papers</p> |
| <ul style="list-style-type: none"> <li>• Personal interaction with global thought leaders</li> </ul>     | <p>Leadership development,<br/>Strategic alliances, Annual Meeting</p>  |

### **Value Proposition**

**Member intimacy** has been established as PCRS' **value proposition**. The following differentiation statements are key elements in establishing PCRS' 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 and innovation in reproductive medicine within a collegial 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' 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 – 2012

#### How will PCRS be enhanced and different in 2012?

- PCRS will be financially stable with appropriate reserves and demonstrated non-dues revenue expertise. **Done!**
- The Society will be openly appreciated for providing an intimate, collegial and secure environment for all stakeholders.
- The PCRS brand will be strong and respected on an impressive number of levels.
- It will be acknowledged as technologically savvy.
- PCRS will consistently demonstrate subject matter expertise in reproductive medicine.
- All business resources will be leveraged for the benefit of its members.
- It will leverage the synergies of members collectively for the benefit of members individually.
- PCRS will enjoy a reputation for cutting edge professional development, communication and leadership development.

### 3 to 5 Year Planning Horizon Outcome Oriented Goals

**Goals** are outcome-oriented statements that represent what will constitute PCRS' 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 future state.

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

#### Goal #1 – Professional Development

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

#### Goal #2 – Networking Opportunities

PCRS will enhance and expand networking opportunities for its membership.

#### Goal #3 – Thought Leadership

The PCRS community will be recognized as subject matter experts in reproductive medicine.

#### Goal #4 – Leadership Development

PCRS will create inclusive, diverse volunteer communities to develop leaders for both the profession and the Society.

**Goal #5 – Financial Viability**

PCRS will be financially viable so it can achieve its core functions and maximize overall effectiveness as well as impact.

**Goal #6 – Brand & Image**

All reproductive specialists will recognize PCRS as a global leader in the profession.

**Goal #7 - Governance**

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

See following pages for notes about the goals above

**\*\*\* Open items should be reviewed to determine if revisions are needed. If the item is deemed to be ineffective or inappropriate for the goal, it should be deleted.**

**\*\*\* In-Progress items have been completed but focus must be maintained to insure continued benefits**

## GOAL #1 – PROFESSIONAL DEVELOPMENT

### Goal

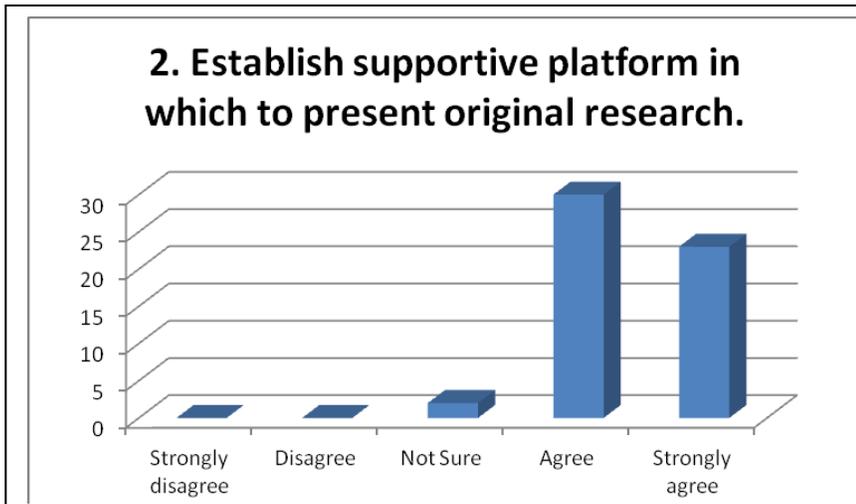
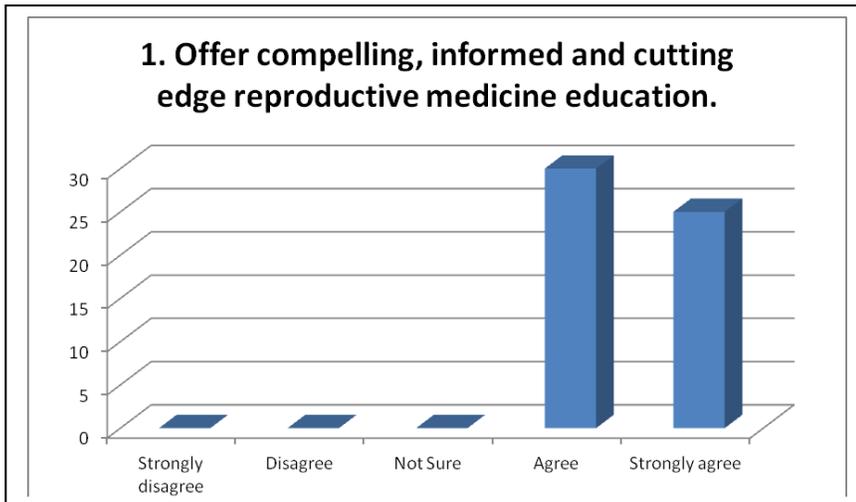
PCRS will be the key provider of superior opportunities for life long learning and establish a clear career path in reproductive medicine.

### Objectives

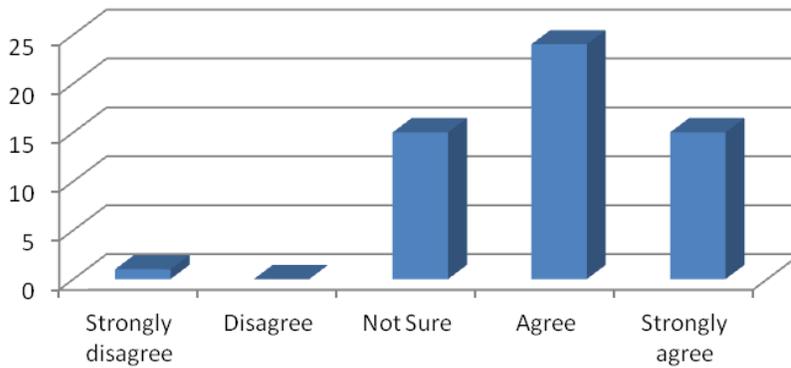
1. Offer compelling, informed and cutting edge reproductive medicine education.
2. Establish supportive platform in which to present original research.
3. Provide mentorship in the field of reproductive medicine.
4. Clearly define career paths for individuals to explore.
5. Demonstrate standards of care to educate and validate the practice of reproductive medicine.

### Strategies

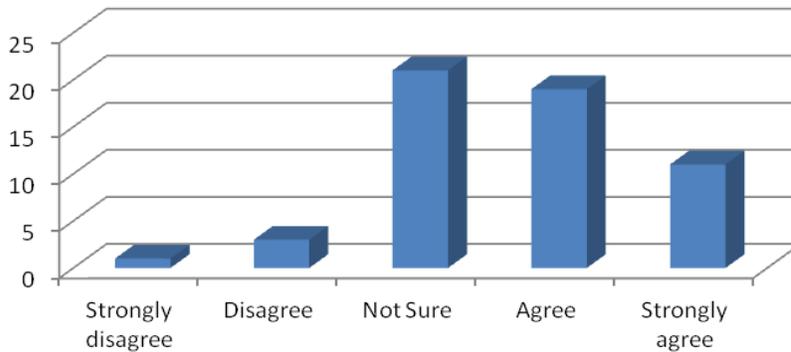
1. Solicit targeted and expanded audiences to enhance paper submissions for annual meeting presentations. **In-Progress**
2. Expand fellowship scholarship program. **Done**
3. Establish mentor program for both new members and first time attendees at annual meeting. **Open**
4. Create Career Headquarters (job postings) on website. **Done**
5. Sponsor high profile keynote experts at annual meeting. **In-Progress**
6. Make state of the art reproductive medicine practices an integral portion of the annual meeting. **In-Progress**
7. Introduce expanded educational opportunities in a variety of formats (e-learning, web-casts, publications, etc.) **Open**



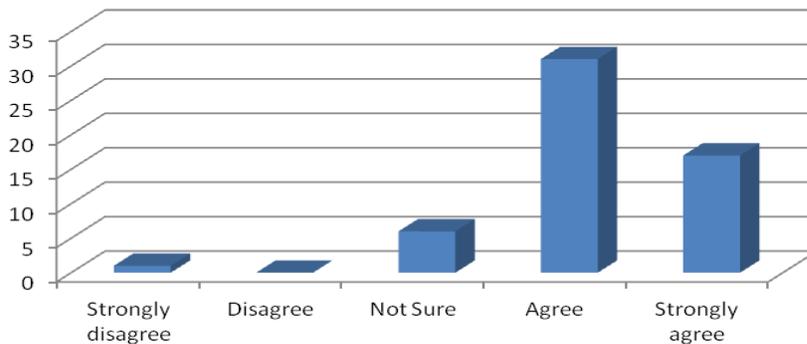
### 3. Provide mentorship in the field of reproductive medicine.



### 4. Clearly define career paths for individuals to explore.



### 5. Demonstrate standards of care to educate and validate the practice of reproductive medicine.



#### Survey Comments:

There should be more efforts to improve networking for fellows.

What kind of mentorship is being offered to residents with sincere interest in the field? Setting up a fellows night in a big room only fosters relationships between current fellows. It would be nice to have a night where residents get to rub elbows with program directors, and where they are mentored in how to pursue the career they desire.

## **GOAL #2 – NETWORKING**

### **Goal**

PCRS will enhance and expand networking opportunities for the membership.

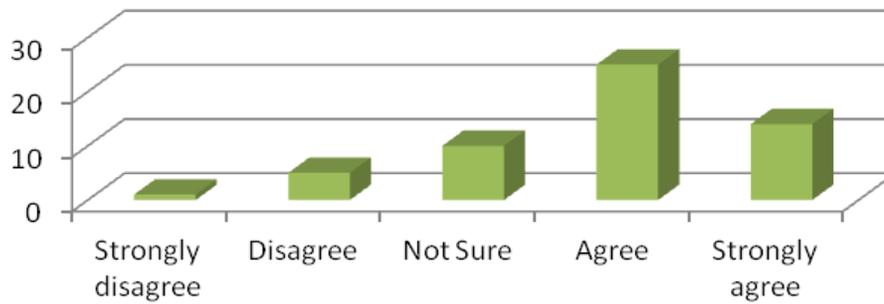
### **Objectives**

1. Improve communications and interactions between members outside of the annual meeting confines.
2. Enhance communications and interactions between members at the annual meeting.

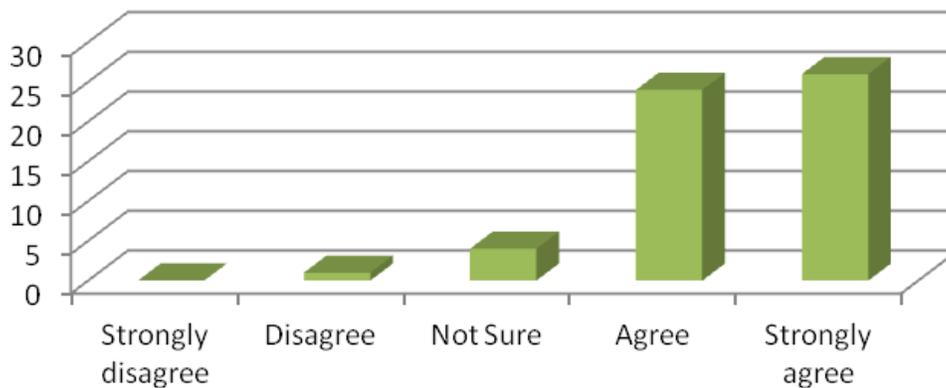
### **Strategies**

1. Ensure that the newsletter is exceptionally reliable, consistent and compelling (*a must read*) **In-Progress**
2. Maximize the interactivity and accessibility of the website through an engaging *Members Only* section as well as the addition of chat rooms, blogs and on-line surveys. **In-Progress**
3. Actively solicit members to become more involved in expanded volunteer committee structure. **In-Progress**
4. Formalize and add value to new member/first time attendee orientation at the annual meeting. **Open**
5. Expand purpose and functions of Hospitality Chair. **Open**
6. Introduce Welcome Center at the annual meeting manned by Board of Directors. **Open**
7. Create forum for special interest groups at annual meeting. **Open**

## 1. Improve communications and interactions between members outside of the annual meeting confines



## 2. Enhance communications and interactions between members at the annual meeting.



### Survey Comments:

Lots of different times for interactions in the exhibit hall make for productive discussions, intros, etc. On the other hand there are no ongoing blogs, sharing of cases online, etc.

Need more work

## GOAL #3 – THOUGHT LEADERSHIP

### Goal

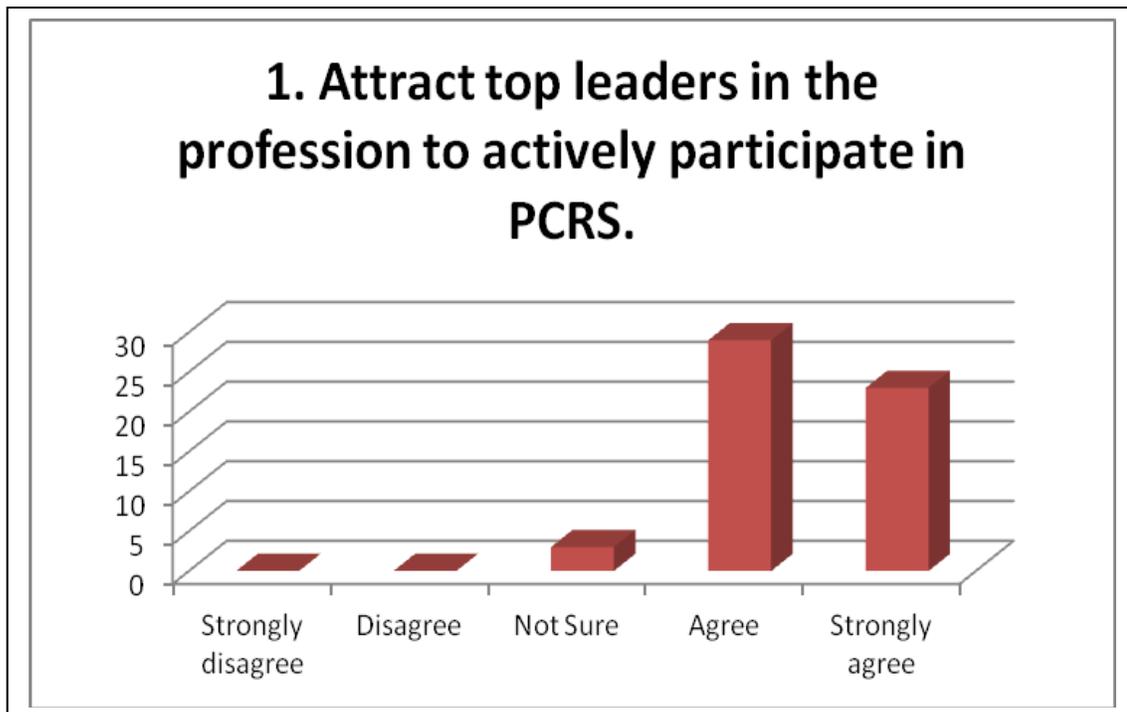
The PCRS community will be recognized as subject matter experts in reproductive medicine.

### Objectives

1. Attract top leaders in the profession to actively participate in PCRS. **In-Progress**
2. Effectively utilize communication vehicles to consistently promote PCRS as reproductive medicine experts. **In-Progress**
3. Encourage mutually beneficial strategic alliances with ASRM as well as other targeted organizations and individuals. **Open**
4. Members of PCRS will be acknowledged and sought after authorities in the field of reproductive medicine.

### Strategies

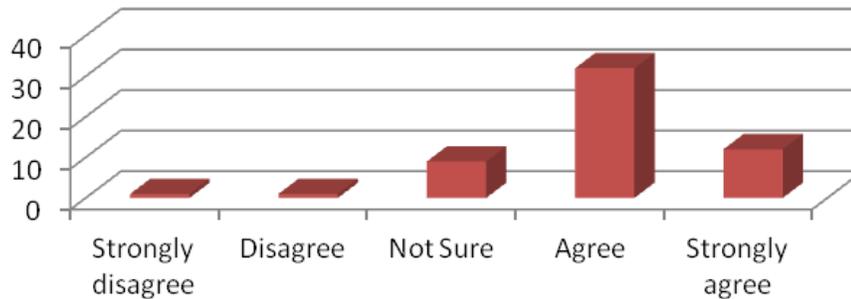
1. Establish a speakers' bureau of PCRS subject matter experts in the field of reproductive medicine. **Open**
2. Provide PCRS speakers with presentation training and power point templates to maximize overall effectiveness and impact. **Done**
3. Actively participate in collaborative endeavors with strategic partners and assume a high profile within the profession. **In-Progress**
4. Develop advertising awareness campaign which promotes PCRS' ongoing contributions to the art, science and practice of reproductive medicine. **Open (How? Why?)**



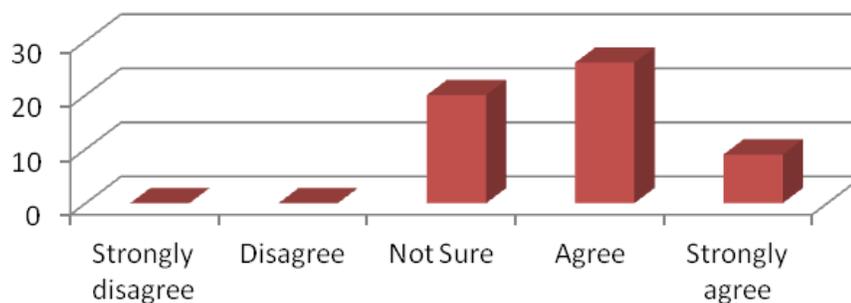
### Survey Comments:

SREI has brochures that we can give patients that explain why their doc's membership has meaning. I've not seen/been aware of interactions with legislature or other influential groups. Again, I've seen no additional benefits to membership other than those attributable to attending the conference.

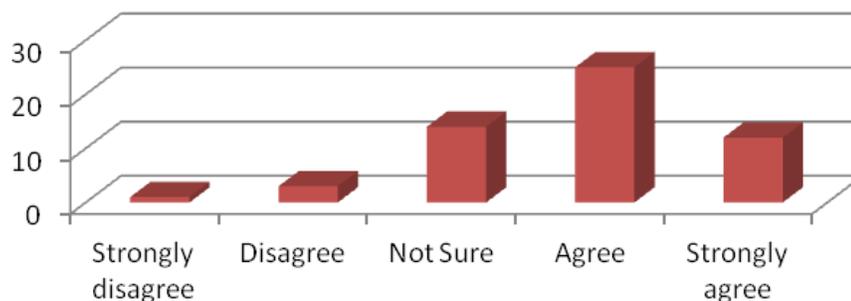
**2. Effectively utilize communication vehicles to consistently promote PCRS as reproductive medicine experts.**



**3. Encourage mutually beneficial strategic alliances with ASRM as well as other targeted organizations and individuals.**



**4. Members of PCRS will be acknowledged and sought after authorities in the field of reproductive medicine.**



## GOAL #4 – LEADERSHIP DEVELOPMENT

### Goal

PCRS will create inclusive, diverse volunteer communities to develop leaders for both the profession and the Society.

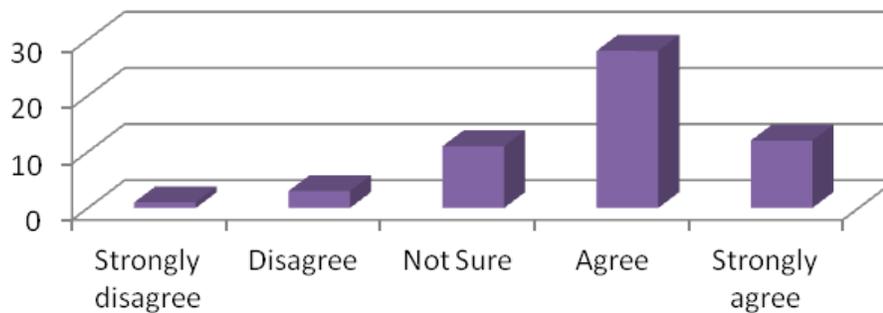
### Objectives

1. Create and introduce a clear, rewarding and beneficial leadership development program for all PCRS members.
2. Ensure greater fellows participation in PCRS **Done**
3. Encourage fellowship directors to take a more active role in PCRS affairs. **Open**

### Strategies

1. Foster a secure, collaborative, inclusive and diverse environment for all PCRS volunteers. **Done**
2. Expand volunteer committee opportunities. **In-Progress**
3. Actively solicit volunteers to serve on PCRS committees. **In-Progress**
4. Host a Leadership Development Forum prior to the annual meeting. **Open**
5. Extend annual meeting registration discounts to fellowship directors and fellows. **Done** for fellows **Open** for fellowship directors
5. Circulate customized leadership development communication vehicles to fellowship directors, fellows and all PCRS committee volunteers. **Open (How? Why?)**

### **1. Create and introduce a clear, rewarding and beneficial leadership development program for all PCRS members.**

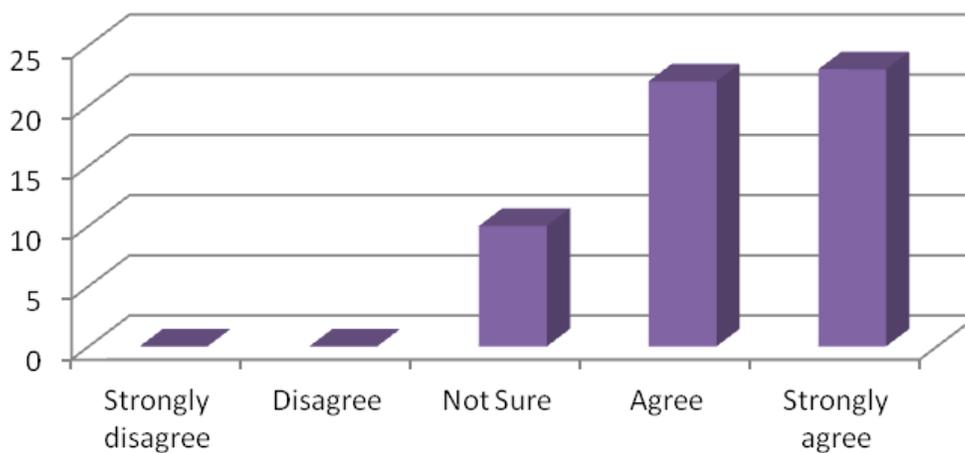


#### Survey Comments:

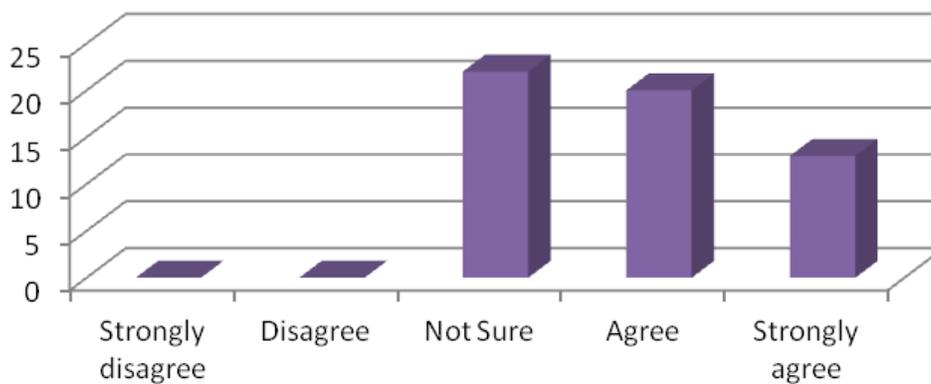
I received a PCRS fellowship stipend last year and want to thank PCRS again for this opportunity. It was a great experience that will keep me involved in PCRS.

I've not heard of discussion that describes benefits/rewards for being part of leading anything. Good encouragement of fellows participation. Good job here.

## 2. Ensure a greater number of fellows participation in PCRS.



## 3. Encourage fellowship directors to take a more active role in PCRS affairs.



## GOAL #5 – FINANCIAL VIABILITY

### Goal

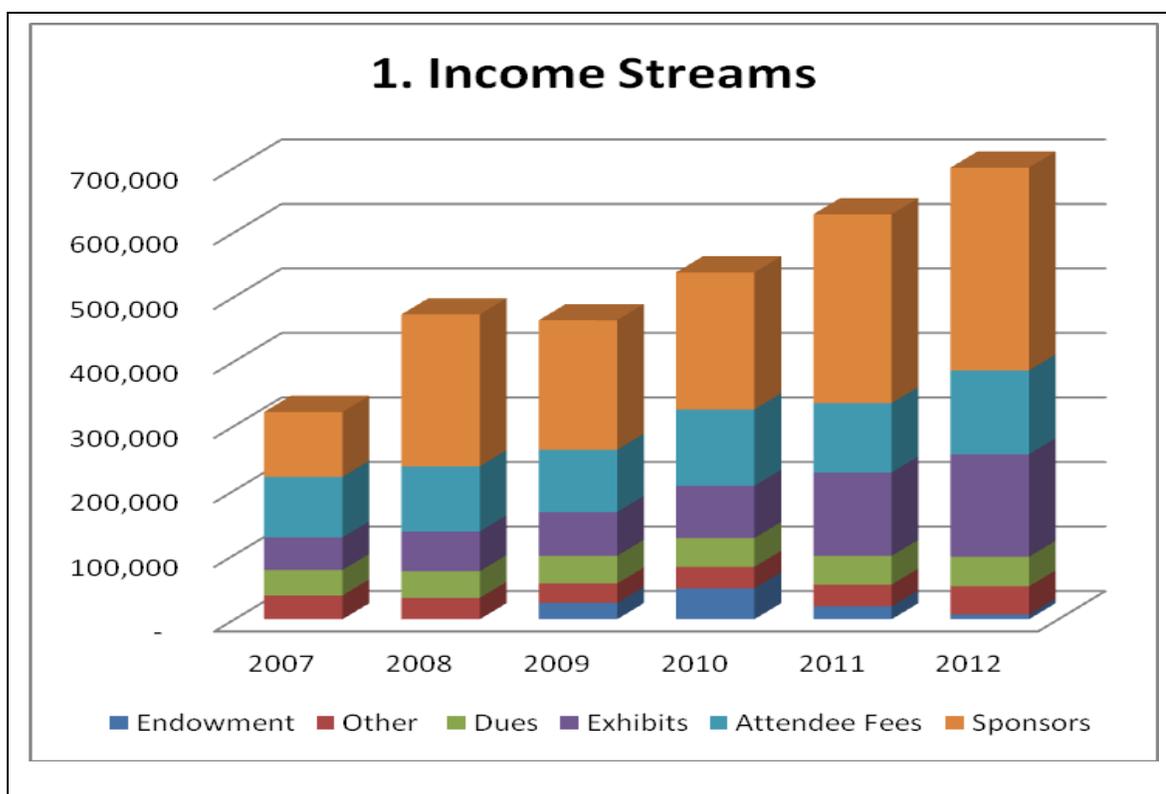
PCRS will be financially viable so it can achieve its core functions and maximize overall effectiveness as well as impact.

### Objectives

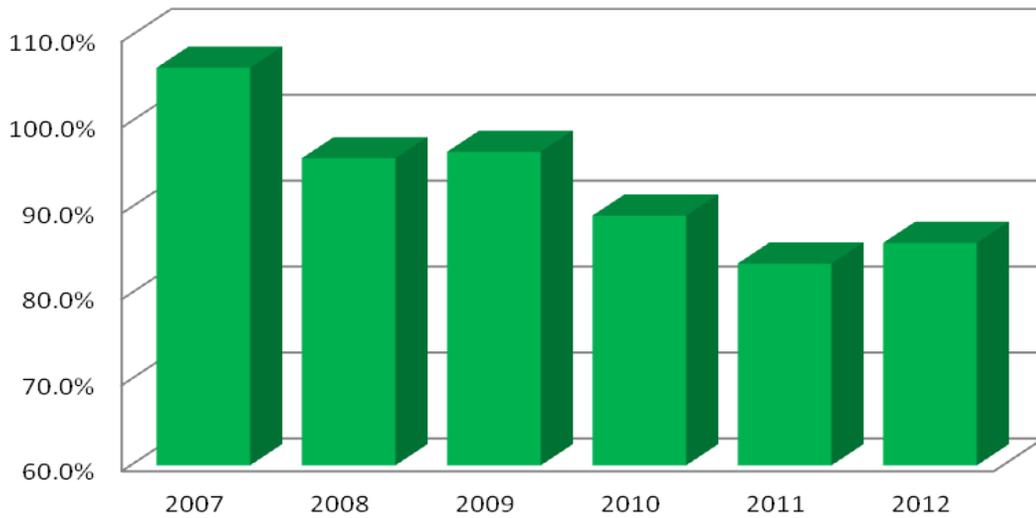
1. Build revenues and diversify income streams. **Done**
2. Maintain expense levels at an appropriate percentage of revenues. **Done**
3. Achieve reserves of two times annual operating costs. **Done**

### Strategies

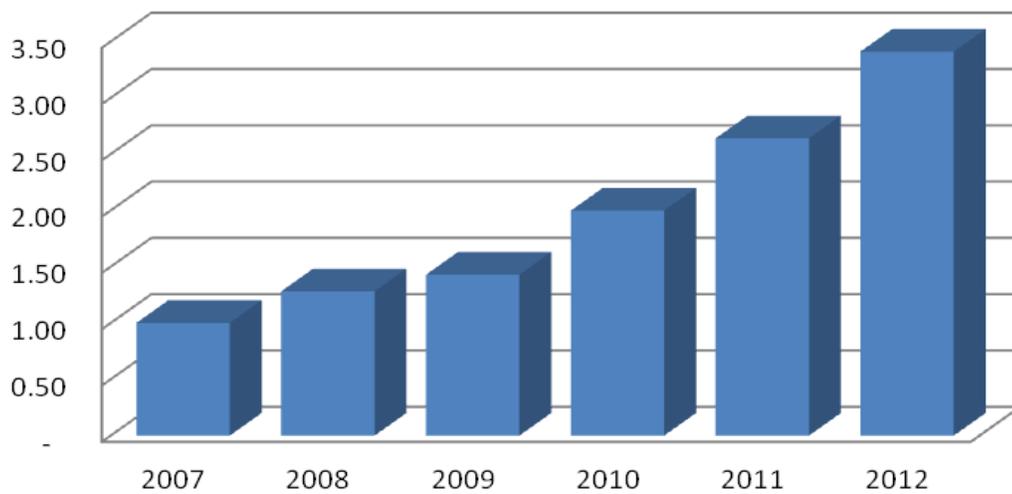
1. Maintain existing sponsor partners while identifying and securing new ones. **In-Progress**
2. Expand educational, scholarship and foundation funds. **In-Progress**
3. Create additional and more distinctive non-dues revenues. **Open**
4. Establish advertising policy for website, newsletter and collateral materials. **Done**
5. Introduce virtual exhibit. **Done – but failed, no commercial interest**
6. Increase membership by 15% per year through active recruitment efforts. **Open**
7. Maintain retention rate over 90% per year. **Open**
8. Increase paid annual meeting attendance by 20% each year. **Open**
9. Contribute \$50,000 per year for the next five years to reserves. **Open**
10. Seriously consider increasing membership dues and annual meeting registration fees in 2010. **Done**



## 2. Expense Levels - Percentage of Revenue



## 3. Ratio of Reserves to Operating Costs



## GOAL #6 – BRAND & IMAGE

### Goal

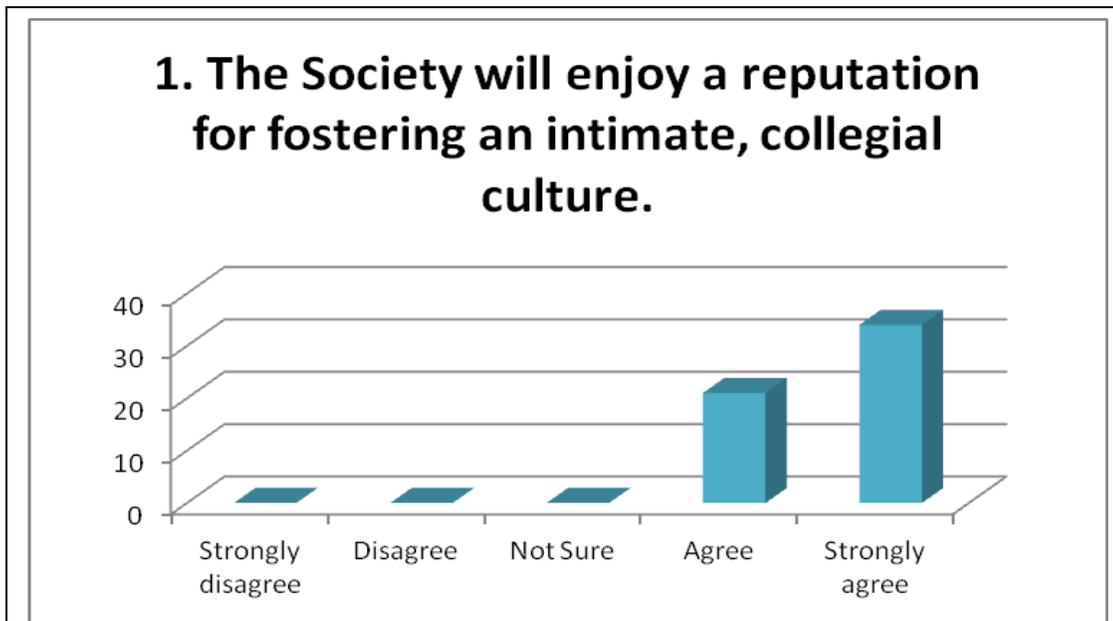
All reproductive specialists will recognize PCRS as a global leader in the profession.

### Objectives

1. The Society will enjoy a reputation for fostering an intimate, collegial culture. **Done**
2. PCRS will be readily identified as an exceptionally inclusive and diverse environment.
3. PCRS will be known for providing easy member access to information, support and resources.
4. PCRS will be a respected authority on reproductive medicine and a credible resource on the profession for both the media and society at-large.

### Strategies

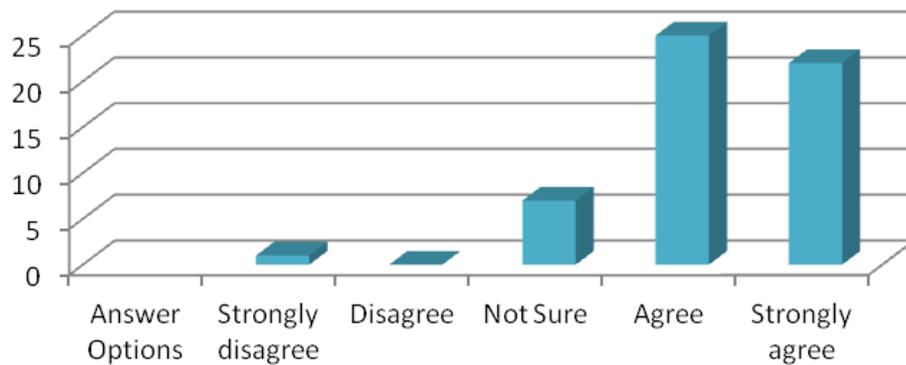
1. Develop brand platform including new Society identity program (logo, collateral, web site redesign). **Done**
2. Draft key messages for media outreach and different stakeholder audiences including: **Open (How? Why?)**
  - Prospective physician members
  - Fellowship directors
  - Fellows
  - Laboratory professionals
  - ASRM
  - Nurse practitioners
  - Mental/allied health professionals
  - Acupuncture practitioners
3. Implement a comprehensive media outreach campaign based on targeted public relations effort. **Open (How? Why?)**
4. Deploy a concentrated marketing plan. **Open**
5. Provide media training for PCRS officers and directors. **Open (How? Why?)**
6. Give consideration to altering membership voting guidelines. **Done**



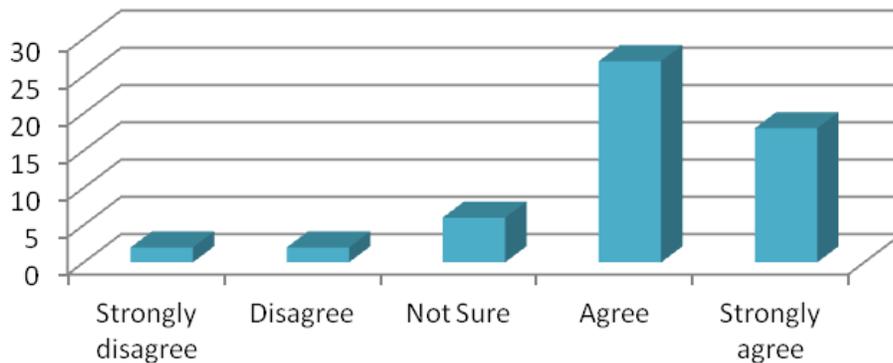
#### Survey Comments:

Collegial? Yes. Inclusive? No. It's a west coast IVF club. Are generalists welcome? Not really. They can join, spend money to come to a conference that concentrates on IVF if they like. Can they get society info for their waiting rooms or to send out with bills or newsletters? No. Are they respected? By whom? Not for anybody I know of.

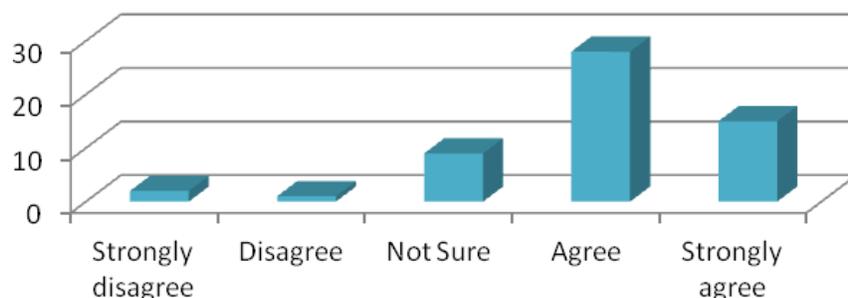
## 2. PCRS will be readily identified as an exceptionally inclusive and diverse environment.



## 3. PCRS will be known for providing easy member access to information, support and resources.



## 4. PCRS will be a respected authority on reproductive medicine and a credible resource on the profession for both the media and society at...



## GOAL #7 – GOVERNANCE

### Goal

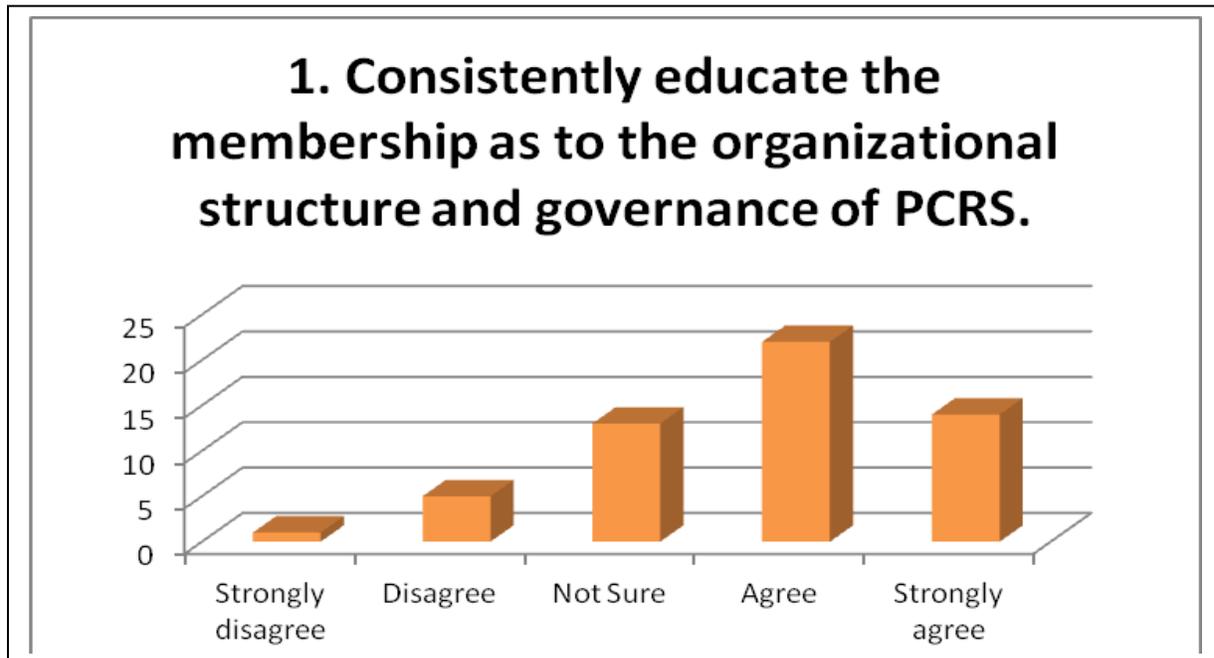
PCRS will clearly identify, define and clarify the governing principles and structure of the Society.

### Objectives

1. Institute a policy manual for the operation of the entire organization. **Done**
2. Consistently educate the membership as to the organizational structure and governance of PCRS. **Done** via Vitality and Annual Report

### Strategies

1. Identify association/medical society governance best practices. **Done**
2. Conduct due diligence to ensure that all policies and procedures are ethically sound as well as representative of PCRS' core values. **Done**
3. The overall structure and governance of PCRS will be inclusive, accessible, member-centric and embrace diversity. **Done**
4. Develop a governance instructional module for the new member orientation program and include an informative overview in the new member kit and post on the website. **Done** – new member kit **Open** – not on web site



### Survey Comments:

I believe there should be a structured administrative meeting for the PCRS members at some point during the annual meeting to educate members about the organizational structure of PCRS (election of board of directors, establishment of committees) and how one becomes involved in the leadership if one so desires. I was introduced to it by a friend and colleague, but it would be good for the entire membership to learn about the structure in a more formal way.

Again, we all come from small or large or academic practices where organizational structure and governance is omnipresent. Do you think we want to hear about PCRS's admin? .....NO!