



STRATEGIC PLANNING – VISION 2032

Table of Contents

Executive Summary	3
Strategic Planning Committee Membership	4
Strategic Planning Methodology.....	4
Mission, Vision, and Core Values.....	5
SWOT Analysis	6
Strategic Domains	8
Strategic Goals	8
Attachment (A) Strategic Planning Committee Charter.....	12
Attachment (B) Strategic Planning Committee Worksheet	13
Attachment (C) ACPA Membership Survey	14
Attachment (D) ACPA Membership Survey Results	15

Executive Summary

The American College of Physician Advisors (ACPA) is a non-for-profit professional organization founded in 2014 to serve the educational and professional needs of the physician advisor community. The ACPA leadership decided in its last Board of Directors (BOD) Retreat (2021) to embark on the journey of developing the ACPA strategic plan (Vision 2032). A Strategic Planning Committee (SPC) with representation from various leadership cabinets of ACPA was formed. The SPC launched its first meeting in March 2022 and concluded its task of presenting the final strategic plan to ACPA BOD in October 2022.

The major milestones achieved by the committee included revision of the mission and vision statements, establishment of ACPA core values, completion of Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis, identification of strategic domains, and surveying stakeholders. Lastly, and using SMART (Specific, Measurable, Attainable, Relevant, and Timely) goal methodology, strategic goal(s) were articulated under each strategic domain.

The revised ACPA mission is to promote and enhance the instrumental role of physician advisors across the continuum of healthcare through education and professional development. The revised vision statement is to be the professional home of physician advisors where industry standards are set through education, certification, mentorship, innovation, and advocacy. Five core values were established to be ACPA core values as a professional organization. The ACPA core values are integrity, diversity, equity, and inclusion, collaboration, leadership, and mentorship.

SWOT analysis was completed confirming that the rich intellectual capital, committed leadership, and the National Physician Advisor Conference (NPAC) are the key strengths of ACPA. The volunteer nature of the organization, the suboptimal technological platform used by ACPA, and absence of guidelines, peer-reviewed publications, and white papers stood out as the key weaknesses of ACPA. There are ample opportunities for ACPA to establish its presence as the pioneer organization in setting the industry standards for the physician advisor profession through the development of physician advisor certification. Creating a sustainable administrative structure is of paramount importance to the success of ACPA and it is an opportunity of the highest order of magnitude. The growing number of offerings from competitive organizations in this space is a recognizable threat given the ACPA's resource limitations to compete against other organizations. NPAC continues to be the biggest financial liability to ACPA at this time especially after the COVID-19 pandemic.

Stakeholders were identified. ACPA leadership and membership body were surveyed to solicit their opinion and feedback about current and future ACPA offerings. Three separate meetings were held with ACPA Presidents, BOD, and Advisory Board members where an open forum methodology was used to solicit their opinion and feedback. The common findings between the surveys and the meetings were aligned with the strategic domains and informed the development of strategic goals.

Seven strategic domains were identified including education, advocacy and government relations, institutional relations and alliances, marketing and branding, member engagement, financial and resource management, and leadership. Strategic goal(s) were articulated within each domain aimed at achieving ACPA Vision 2032.

Strategic Planning Committee Membership

- 1- Juliet B. Ugarte Hopkins, MD – President
- 2- Ahmed Abuabdou, MBBS – Vice-President of Operations – Chair
- 3- Clarissa Barnes, MD – Vice-President of Member Engagement
- 4- Denise Goodman, MD – Member of ACPA Board of Directors
- 5- Emeric Palmer, MD – Member of ACPA Board of Directors
- 6- Neil Parikh, MD – Member of ACPA Advisory Board
- 7- Dan Zirkman, MD – Member of ACPA Advisory Board
- 8- Parthavi Das – Administrative Director (non-voting member)
- 9- Amy James-Meurs – Support Staff (non-voting member)

Strategic Planning Methodology

The ACPA VP of Operations was tasked with developing a strategic plan for the organization in the last BOD Retreat in 2021. A formal Strategic Planning Committee (SPC) was structured with representation from different ACPA leadership cabinets (BOD, Executive Committee, and Advisory Board). The SPC launched its first meeting in March 31, 2022 and concluded its last meeting in October 3, 2022. Meetings were held virtually using Zoom platform and each meeting lasted for approximately 90 minutes.

Date	Milestone
March 31, 2022	Introduction and Discussion about mission, vision, and core values
April 18, 2022	Mission, vision and core values
May 12, 2022	SWOT analysis
June 16, 2022	Strategic domains and goals
August 30, 2022	Strategic domains and goals
August 31, 2022	Survey of membership body launched for 2 weeks [Attachment C]
September 7, 2022	ACPA Presidents feedback Dr. Edward Hu, Dr. Charles Locke, Dr. Juliet B. Ugarte Hopkins Ms. Elizabeth Lamkin
September 13, 2022	ACPA Advisory Board feedback
September 21, 2022	ACPA Board of Directors feedback
October 3, 2022	Strategic domains and goals Review of survey results and stakeholders' feedback

Mission Statement

The mission statement was revised to reflect the position of ACPA regarding the profession of physician advisors.

To promote and enhance the instrumental role of physician advisors across the continuum of healthcare through education and professional development.

Vision

The vision of ACPA was revised as well to reflect the future destination of ACPA.

To be the professional home of physician advisors where industry standards are set through education, certification, mentorship, innovation, and advocacy.

Core Values

The SPC approved the addition of a set of core values that ACPA will stand for. The ACPA core values are:

- ***Integrity***

ACPA demonstrates its moral conduct in every decision being made guided by the commitment to the physician advisors' community.

- ***Diversity, Equity and Inclusion (DEI)***

ACPA respects and recognizes differences in age, gender, ethnicity, race, religion, and physical abilities as a source of strength, and embraces diversity of thoughts.

- ***Collaboration***

ACPA is stronger with cohesive team work rather than individual performance. Our accomplishments are the fruits of the collective wisdom of the team.

- ***Leadership***

ACPA exerts an influence on the professional life of physician advisors so they have positive impact on their local community and the profession of physician advisors.

- ***Mentorship***

ACPA is committed to motivate and support physician advisors to grow professionally and fulfill their aspiration.

SWOT Analysis

Strengths

The ACPA praises itself as the first in the market to serve as the common hub for physician advisor community as it pertains to education and professional networking. The organization possesses rich intellectual capital that is capable of providing unparalleled body of knowledge for physician advisors at different stages of their professional career. Networking capital is another highlight of ACPA commitment to promote the successful role of physician advisors through exchange of experiences. The combination of intellectual and networking capitals provided solid grounds to ACPA's flagship event (National Physician Advisor Conference [NPAC]) serving the educational and networking demands of physician advisors community. ACPA has an active presence in the social media arena focused on marketing ACPA events and highlighting ACPA members' achievements. ACPA maintains excellent relationships with other organizations in the industry built on mutual benefits to the body of membership. ACPA continues to maintain a strong financial position consistently fulfilling its financial obligations.

Weaknesses

The national presence of ACPA is limited to the confinement of hospitals and health systems represented by the membership body. In addition, the lack of concise definition and description of the physician advisor role contributed to the lack of solid identity of the organization creating an impactful national publicity. Lack of peer-reviewed publications, white papers, and suggested guidelines or best practices prevented ACPA from being the organization sought after for physician advisor industry standards. Being a volunteer driven organization with limited pipeline of leaders continues to represent one of the biggest challenges to ACPA growth. While current efforts are geared toward building a strong administrative support staff, this poses additional challenge to the organization's growth and prosperity. ACPA lacks an effective member engagement and mentorship strategy which would maximize the value of membership. This is exacerbated by the absence of a dynamic technological platform that accommodates the organizational as well as member's needs.

Opportunities

ACPA is in a unique position to serve as the authority which sets industry standards and best practices in the landscape of physician advisors. Deemed as a need and necessity, launching a physician advisor certification will offer ACPA membership the opportunity to obtain a credential built on mastering core physician advisor knowledge areas. When the certification offering is coupled with a well-structured mentorship program, physician leadership offerings, and expansion of networking opportunities through regional groups or state chapters, the value of membership will be heightened. ACPA has an important role to play as an intermediary and as a collaborator between physician advisors of hospitals or health systems and medical directors of various payers. ACPA has tremendous opportunity to design and implement strategic alliances with other organizations that cater to various physician advisors' needs where collaboration and benefits are examined and delivered through strategic lens maximizing ACPA membership benefits. A sustainable administrative structure is of paramount importance in ACPA growth strategies and therefore, it is an opportunity of the highest order.

Threats

ACPA recognizes the compliance risk associated with interpretation of healthcare regulations and policies posing a threat of significant impact. ACPA also recognizes the various competitive offerings from other organizations in the same space creating a barrier to growth in membership body. The National Physician Advisor Conference represents the biggest financial threat and liability to the existence of ACPA.

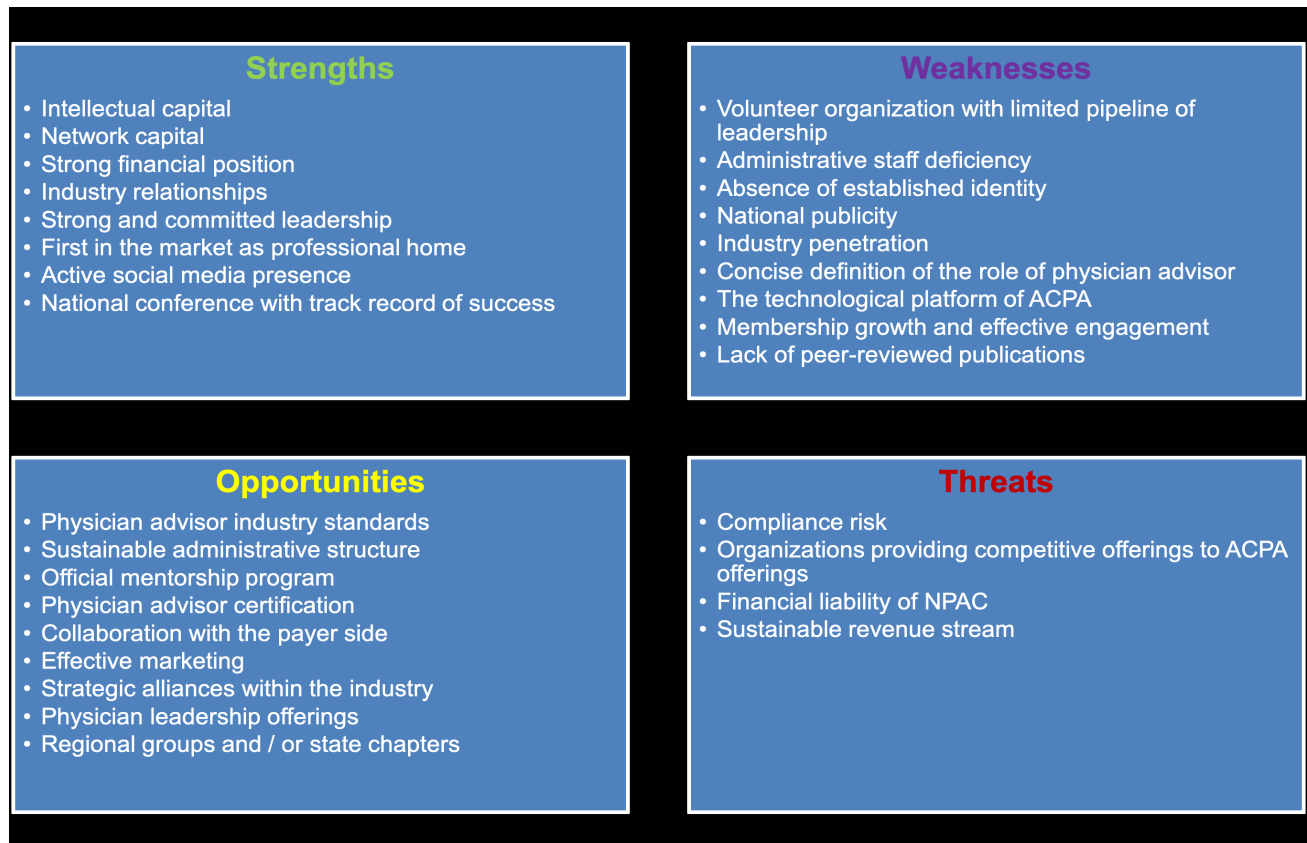


Figure (1): SWOT analysis summary

Strategic Domains

The SPC identified seven strategic domains under which strategic goals are articulated. These seven domains are:

- Education;
- Advocacy and government relations;
- Institutional relations and alliances;
- Marketing and branding;
- Member engagement;
- Financial and resource management;
- Leadership.

Strategic Goals

The strategic goals were articulated using SMART (Specific, Measurable, Attainable, Relevant, and Timely) goal methodology.

Education

- Goal (1): Offer a physician advisor certification program by November 2023
 - By December 2025, 25% of ACPA physician members are certified
 - By December 2027, 50% of ACPA physician members are certified and 50% maintain their certification
 - By December 2029, 75% of ACPA physician members are certified and 75% maintain their certification
 - By December 2032, >85% of ACPA physician members are certified and >90% maintain their certification
- Goal (2): Reorganize and create new content for The Learning Center (TLC) to support physician advisor maintenance of certification and the ACPA membership
 - By December 2023, the newly organized TLC will be available to ACPA members with updated content in a yearly basis.
 - By December 2025, revenue generated by TLC is increased by 20%
 - By December 2027, revenue generated by TLC is increased by 30%
 - By December 2029, revenue generated by TLC is increased by 40%
 - By December 2032, revenue generated by TLC is increased by 60%

Advocacy and Government Relations

- Goal (1): Review, and submit **yearly** comprehensive comments to CMS regarding the IPPS, OPPS, and any other relevant proposed rules.
 - Outcome:
 - Number of submissions per year
 - Quality of submissions
 - Readers' comments
 - Impact (CMS endorsement of ACPA recommendation)
- Goal (2): Provide ACPA members with plain language summary of IPPS, OPPS, and any other relevant CMS proposed rules on a **yearly** basis.
 - Outcome:
 - Number of summary statements issued yearly
 - Readers' comments
- Goal (3): Recognize and comment on Coding Clinic Guidelines issued **quarterly** representing ACPA opinion.
 - Outcome:
 - Number of comments
 - Quality of comments
 - Readers' comments
 - Impact (AHA endorsement of ACPA recommendation)
- Goal (4): Actively participate in the ICD-10 Coordination and Maintenance Committee representing ACPA by 2027.

Institutional Relations and Alliances

- Goal (1): By December 2025, ACPA will offer a yearly joint town hall with the Association of Clinical Documentation Integrity Specialists (ACDIS) and the Case Management Society of America (CMSA)
 - Outcome:
 - Number of attendees
 - Membership sign-up within 1 week of the event
- Goal (2): By December 2027, ACPA will partner with ACDIS and CMSA to publish a position statement and / or white paper

Marketing and branding

- Goal (1): Develop a marketing and branding strategy with assistance from a third-party vendor by December 2024
 - Outcomes:
 - By December 2023, vendor discovery and selection process will be completed
 - By October 2024, final marketing and branding strategy will be shared with BOD

Member Engagement

- Goal (1): By year 2024, offer a formal mentorship program to the college's membership.
 - Outcomes:
 - By December 2025, 20 members will enroll in the mentorship program
 - By December 2027, 40 members will enroll in the mentorship program and 10 members who completed the program will join as mentors
 - By December 2029, 60 members will enroll in the mentorship program and 20 members who completed the program will join as mentors
 - By December 2032, 100 members will enroll in the mentorship program and 30 members who completed the program will join as mentors
- Goal (2): By year 2024, update the website of ACPA with the goal to provide meaningful and engaging end-user experience.
 - Steps:
 - By December 2023, ACPA will complete the vendor discovery phase
 - By December 2024, new ACPA website will be revealed to ACPA members
 - Measures:
 - Website traffic analysis metrics
 - Membership growth of 3% per year
- Goal (3): By December 2023, ACPA will transition social media posting to third party platform to allow for planned posting 5 days a week.

Financial and Resource Management

- Goal (1): On a yearly basis, ACPA will utilize at least 25% of last year's net revenue to provide new offerings to membership and / or improve existing offerings with expected return of 25% increase in offering related revenue each year.
 - Outcome:
 - Financial proforma displaying anticipated ROI of each offering
- Goal (2): By year 2023, each educational offering will function as a distinct business unit from budget standpoint.
 - Outcome:
 - Business plan for each new offering including anticipated revenue and expenses
- Goal (3): By year 2024, establish 90-days emergency fund.
 - Measure:
 - Cash-on-hand (saving account balance of 90-days expenses)

Leadership

- Goal (1): Create and maintain succinct timelines and pathways for college BOD's role including job descriptions, succession planning, and manners in which active and talented members are nominated into leadership roles within the college.
 - Outcome:
 - By December 2023, a written plan to amend ACPA bylaws will be submitted to reflect the new succession plan process
 - By December 2024, a structured nomination process will be published on ACPA website