



Society for  
**Participatory  
Medicine**

Transforming the Culture of Patient Care



## 2019 SPM Strategy

FINAL



# Executive Summary



- SPM has had success, but to be a more impactful organization, it must improve its core abilities while simultaneously building for the future.
- Immediately, it must optimize those aspects of its operation that are more routine in nature for more scalable organizations [governance, finance, member renewal, staffing].
- It must raise more money to scale itself, building on past successes in the short term.
- It must critically assess, sustain, and improve what its members value through its website, communities, journal, conference, which all appear to be table stakes, compared to other organizations in SPM's space..
- It must advance its reputation and brand.
- If it opts to do a significant initiative, the initiative should support its goals to strengthen, differentiate, and scale SPM.
- Longer term, SPM must set its approach to advance organizational impact in the evolving health care environment and deliver greater value to consumers, providers, the healthcare system, and members.



# Summary of SPM's Current State



- Opportunity to increase: membership growth; financial resources; enhance governance
- Build member engagement and grow membership renewal
- Assess the Journal's focus and value
- Conference substantially increases SPM revenue and membership for SPM; its staging could be simplified and better focused to improve impact, with clarified roles, delegation, and a clarified focus of the event
- Organizational opportunities to improve setting and executing goals, per attendees at board retreat

## Takeaways:

- Stabilize membership with a member engagement and retention program; understand member expectations for SPM
- Assess critically assess Journal, conference, Connect, communities; determine what will be required for them to increase in value to SPM and its membership and what their potential is to drive member growth, improve finances, and support SPM's mission
- Maintain Conference in 2019, which generates revenue, while other options are explored
- Increase external funding; enhance effectiveness of governance; plan for addition of staff



# Retreat Summary



- Agreement that in 2019, SPM must focus on
  - Membership growth
  - Organizational growth [governance, revenue, staffing]
  - Taking action[s] that support SPM's mission [no decision about initiative]
- Prioritization of existing activities not discussed in depth
- SPM's longer range direction not discussed
- Concerns expressed
  - Insufficient organizational resources to take on new initiatives
  - SPM doesn't work efficiently and there is too much on the plate
  - Murky governance processes in need of improvement
  - Disagreement about whether mission is clear and guides the direction SPM should be taking

## Takeaways:

- It's critical for changes in governance process to be accompanied by a review of culture to be sure new processes are well- implemented.
- Reviewing SMP mission is needed and a setting a vision that will be used to prioritize SPM's short and longer term strategic initiatives.
- Retreat brainstorming resulted in the identification of a number of initiatives. SPM needs to be sure these are all the possible options and evaluate the high potential initiatives against criteria to be certain the best alternatives are chosen. [See Appendix for possible criteria]
- SPM needs to focus on strengthening its foundations while building its future at the same time. It needs to establish processes to do both.
































# Looking Outside SPM

## Areas to Expand Impact?



# Adjacent/Overlapping Organizations:

Many have same or better abilities as SPM

Constituent Focus	Patient	Care Giver/Advocate/Patients	Patient, Advocate, Provider, Stakeholders [SPM's Vertical Space]	Provider/Professionals
Better Care			    	   
Patient Support, Policy Advocacy		 	 	
Better Experience			  	
Health Literacy, Shared Decisions	 		 	
Safety				
Access to Trials				

- SPM is in a crowded space, with many overlapping organizations that are actively growing and pursuing their agendas, vertically and horizontally
- These organizations often have robust capabilities, per their websites [e.g. member and stakeholder tools, information, specific calls to action, corporate sponsors, hold conferences, have online journals, actively blog; many report on growth, grants, new initiatives and alliances]

**Takeaways:** SPM should assess and prioritize enhancement of its present programs [Journal, conference, website, Connect] that best serve immediate goals of member and financial growth, in order to create a foundation for future growth; for the future, identify and prioritize those capabilities it needs to offer to successfully further extend its mission; prioritizing must be done with care as adjacent organizations offer many of these capabilities and they can be seen as table stakes; SPM can differentiate the value it offers, relative to adjacent organizations, promoting what it uniquely brings to the movement to change health care culture



# Longer Term Trends and Implications

## Potential to Create SPM Opportunities?



<b>Trends</b> <small>[sources: PWC <a href="#">Top Health Industry Issues of 2019</a>, 2018; McKinsey, <a href="#">Digital Trends</a> 9/17; WSJ, <a href="#">2019 Healthcare Industry Outlook</a>, 2.6.19; Deloitte, <a href="#">2019 HealthCare Trends</a>; Willis Towers Watson, <a href="#">Annual Employer Survey</a>, 1.3.19]</small>	<b>Possible Implications for Consumer Engagement</b>
<b>Rising consumer expectations</b> for simplicity, access, convenience, price transparency, no surprises	<b>Consumers may be increasingly interested in engagement</b> messaging that helps them meet their needs and priorities
<b>Virtual care, precision medicine, digital therapeutics, AI, big data analytics</b> on the cusp of adoption, as healthcare is starting to act more like other industries	<b>Consumers</b> will need to learn the value of an integrated health record and <b>assume new responsibilities</b> when using emerging care technologies
<b>Employers' concerns</b> [cost, employee engagement, securing talent] and doubt about industry improvement continue; growing investment in wellbeing, telehealth	<b>Potential to inform and mobilize employers</b> who want to support patient engagement programs for their employees and increase the use of digital care
<b>Innovations</b> like performance-based payment, provider-carrier partnerships, acquisitions and alliances between providers and carriers are increasing	<b>Greater carrier/provider collaboration</b> to improve the value of care and coverage, may increase interest in innovative patient engagement programs
<b>Industry consolidation</b> vertically and horizontally; acquisitions, formation of alliances, affiliations <b>drive industry scale upward and create integrated systems of care and coverage</b>	Industry integration and greater scale suggest that <b>health care organizations will</b> be increasingly interested in encouraging consumers to stay within their systems of care and will <b>want to engage consumers</b> toward that end.
<b>Medicare for All</b> potential on state by state basis [assumes continued role for private sector]	<b>Potential for greater government regulation/requirements</b> for carrier's communications to consumers

**Takeaways:** Efforts to improve care, health and the digitization of the healthcare industry create an opportunity for SPM to offer consumers, employers, carriers, and provider organizations information, tools, and support to be effectively and mutually engaged to improve the culture and delivery of health care. SPM should explore the strategy, scope, and feasibility of developing such programs for the future and should consider including discussion of these trends and their impact on being an engaged patient, now.



# Findings



## Short Term

- Maintain revenue sources and enhance membership retention

## Membership Growth

- Focus on providing greater member value and strengthen SPM's voice, to enhance its relevance and impact for members
- Develop formal member retention programs

## Operational Growth

- Strengthen its governance and financial strength to achieve its mission. Grow SPM's administrative and governance capabilities.
- SPM's online assets [conference, Journal, website] are valuable for revenue and can support membership growth. They each need to be critically assessed and strengthened
- SPM's mission overlaps with other organizations' missions, making it critical to differentiate itself and deliver value to members.
- There are stakeholders, such as employers or carriers who might be sympathetic to SPM's mission and who might be able to contribute support

## Signature Initiative

- Initiatives should place SPM in a thought leadership position and build its organizational strength





# Strategy: SPM must enhance existing and build new capabilities, simultaneously

*It's not an either/or. SPM needs to enhance its present capabilities while it plans its next evolution*

## 2019-Foundation

- Enhance SPM's capacity [governance, culture, financial plan, members, marketing, staffing]
- Prioritize, plan and begin to enhance web, conference, journal
- Strengthen SPM revenue and start to improve member engagement and retention
- Plan significant initiative[s] to improve member value and deliver on SPM's mission

## 2020-2021 Focus

- Continue taking immediate steps to enhance SPM [web, conference, journal, infrastructure, financial position, membership]
- Implement strategy to improve member value, create alliances, offer thought leadership, build awareness of SPM's thought leadership
- Deliver initial significant initiative
- Formulate further significant initiative[s] that support mission and reflect how the healthcare terrain is rapidly changing

## 2022+ Future

- Review strategy and reset goals for next period of growth
- Add new member value, increase scale of SPM impact, and extend thought leadership
- Formulate and deliver transformative significant initiative

### Note:

- tasks in black font represent enhancements to existing capabilities;
- tasks in blue font represent acquisition of new capabilities



# Appendix



# Roadmap of Multi-Year Initiatives



	2019	2020	2021
<b>1. Strengthen Present State</b>			
Enhance Member Engagement Tools [web, journal, conference, webinars]	Simplify making contributions and renewing membership; maintain existing programing	Adjust programming to reflect findings regarding delivering value to members	Reassess and adjust programming as needed
<b>2. Create Foundation for Future</b>			
Grow Membership and Influence	Understand SPM member perceptions of value: survey members; mine data; review/refine vision	Identify new programming priorities, phase their development and initiate phase 1	Complete development of phase 1 programming priorities; plan phase 2
	Develop key brand messages and brand storyline and incorporate consistently into communications; develop "elevator pitch"	Make brand a common and driving force in SPM decisions on strategy, products, communications, partnerships and public policy	Significantly expand brand awareness using expanded campaigns
Improve Organizational Stability, Governance and Capacity for Action	Complete Governance Assessment; Implement initial recommendations	Implement longer term governance improvement recommendations;	
	Assess SPM's governance culture; assure it aligns with new structure to increase board effectiveness	Continue to work to strengthen board effectiveness	Continue to work to strengthen board effectiveness
	Use review of mission and set vision; define short-term/long term goals to achieve vision; develop financial and staffing plan to meet goals		
	Define long term revenue model	Assess, prioritize new revenue sources/models; secure new funds and new funding sources	Continue to expand new revenue sources/models
<b>3. Build Future State</b>			
Strategy	Review mission and set future vision; develop criteria to assess short and longer term initiatives; complete multi-year plan for SPM's future state, based on criteria	Implement 2020 priorities [e.g. improve member value, create alliances, offer thought leadership, build awareness of SPM's thought leadership]	Implement 2021 priorities; assess need for future state plan update
Signature Initiative[s]	Assess alternatives against strategic criteria, membership and financial goals; develop first initiative; determine criteria pilot initiatives for the future	Deliver first signature initiative Pilot second round future-looking initiatives	Deliver second transformative signature initiative



# Possible Criteria for Signature Initiatives



- Improve SPM bottom line
- Deliver member value
- Support brand goals
- Initiative has a champion on the SPM board
- Initiative demonstrates its value to SPM
- Initiative has an acceptable risk profile



# SPM's Mission and Strategy Framework



NOTE: I added the sentence in italics under Transform Culture of Healthcare, which to my eye is too general, doesn't offer a clear sense of what SPM is trying to pursue, and does not demonstrate value for sponsors or members to rally behind. What I wrote may not be right, but words needed to make SPM's goals and vision real to audiences.

