



Strategic Plan Developed January – April 2022

Mission

To equitably promote and protect the health, safety, and well-being of all individuals at work and in their environment through education, engagement, leadership and advocacy. WOEMA advocates for health equity through justice, diversity and inclusion.

Goals & Tactics

Key Issue: Education: *Sharing ideas and knowledge in an innovative and progressive manner.*

- 1. Increase participation in education and professional development programs**
 - a. Create Education Task Force to establish and refine tactics below.
Lead: Sheri Belafsky Due: Q1 2023
KPI:
 - i. Task Force created (Q1 2023)
 - ii. Task Force increases participation in programs by 10% by Q1 2024

- 2. Assess and respond to learner's needs (re: contents/platform/certification requirements)**
 - a. Design a member needs survey to determine how people want their education delivered.
Lead: Aisha Chaudry
Due: Q4 2022, ready to send out after WOHC 2022
KPI:
 - i. Number and percentage of members responding to survey
 - ii. Analytics on information gathered
 - iii. Plan developed to use the results (Y/N)
 - iv. Plan to respond to survey distributed to leadership and membership

 - b. Evaluate and improve technology for education delivery.
Lead: Education committee, Lutine Due: Q4 2023
KPI:
 - i. Identify 3-4 current/emerging technologies for delivering education
 - ii. Recommend adoption of one appropriate technology

- c. Explore ways to broaden content to include Board Certification/Maintenance of Certification (BC/MOC) longitudinal assessment requirement.
Lead: Sheri Belafsky Due: Q1 2024
KPI:
 - i. BC/MOC offered for WOHC (Y/N)? Measured every year
 - ii. Number of new courses/content/processes added to WOHC and educational offerings in order to meet BC/MOC requirement.

- d. Build a database of high quality occupational professionals who are willing to provide expertise in WOEMA states and give talks to WOEMA and external audiences, including residency programs
Lead: David Caretto, Educational Committee
Due: Q4 2023
KPI:
 - i. Number of speakers added
 - ii. Number of topics added
 - iii. N/percentage increase in new professionals added
 - iv. Frequency of using added speakers over the following two years
 - v. N/percentage increase in external stakeholders who consult WOEMA for assistance and/or use this list
 - vi. Number of WOEMA members on this list who give external talks

3. Incorporate JEDI issues into all education provided by WOEMA/WOHC

- a. Develop process to ensure all educational content considers JEDI
Lead: Sheri Belafsky, Aisha Chaudry, David Caretto working with Education Committee and JEDI Committee Due: Q3 2023
KPI: 100% of webinars, podcasts, sessions, etc. proactively consider JEDI values.

- b. Develop consistent process/protocol to select speakers and topics to retain and raise awareness of JEDI
Lead: Sheri Belafsky, Aisha Chaudry, David Caretto working with Education Committee and JEDI Committee.
Due: Q3 2023
KPI: 10% of webinars, podcasts, sessions, etc. that explicitly address JEDI issues: goal is at least one non-WOHC webinar and one podcast per year.

Key Issue: Engagement: *Fostering an inclusive environment of occupational professionals committed to the delivery of quality care and expertise in OEM throughout their career.*

1. Increase engagement of our current members.

- a. Develop an ongoing, simplified process for membership to contribute ideas and to provide feedback on initiatives and programs.

Lead: Membership Committee

Due: Q4 2023 and annually

KPI:

- i. N events held to engage members
- ii. N and percentage increase in members participating in engagement programs from Q3 2022 to Q3 2023.

- b. Increase attendance at WOEMA committees/events and WOHC

Lead: Membership Committee, Education Committee

Due: Q4 2023—ongoing

KPI:

- i. WOHC attendees: number and percentage increase from 2022-2023 and every year after: goal is 5% increase year over year and then maintain over 80% of members attending
- ii. percentage increase in webinar/podcast registration and attendance: goal is >50% registrants attending
- iii. percentage increase of members participating in committees. 47/510 currently participate on committees or higher. Goal: 10% of membership involvement for year 1, then increase yearly by at least 2.5% until minimum of 25% of membership thereafter.

- c. Define and design an engagement plan for each of the five WOEMA states.

Lead: Lutine, Membership Committee, Legislative Committee

Due: Q3 2023

KPI: N members engaged in each of the five states and percentage increase before and after plan: goals to be defined by committees.

- d. Improve social media messaging and engagement

Lead: Lutine, Website Committee, Newsletter Committee

Due: Q2 2023

KPI:

- i. Increase in N and percentage of visitors and clicks to website
- ii. Number (N) of social media outlets on which WOEMA has a consistent presence and percentage increase from Q3 2022
- iii. 100% of newsletters and member-wide emails (where relevant) posted to social media.

2. Improve internal collaboration and accountability

- a. Improve coordination between committees to ensure efficiency of goals and resources

Lead: Lutine, with all Committee chairs Due: Q1 2023

KPI:

- i. Number of collaborative projects introduced and completed
- ii. N of committees collaborating on N projects.
- iii. Number of newsletter articles describing inter-committee work

b. Improve communication efficiency between committees and Executive Committee and BOD.

Lead: Lutine, Executive Committee, all Committee chairs

Due: Q2 2023

KPI:

- i. Number and percentage of committees that use recommended reporting tool;
- ii. Reduced turnaround time (days) for EC and BOD to make decisions needed by committees
- iii. Reduced number of communications to committees to achieve complete BOD report (Q3 2022-Q3 2023)

c. Improve communication of committees to membership and leadership

Lead: Lutine, WOEMA President, Newsletter editor, Website committee

Due: Q1 2023 and ongoing

KPI:

- i. Annual communication plan revised every year
- ii. Number of WOEMA committees highlighted in newsletter (goal: one per issue or 6/year)
- iii. Number e-blast announcements sent to membership
- iv. Number and percent of e-blasts that are also posted to social media and website
- v. Annual review of website for accuracy

d. Incorporate leadership training as expectation of holding WOEMA leadership positions.

Lead: David Caretto and Sonya Meyers

Due: Q3 2022 and ongoing

KPI:

- i. Presentation to BOD at Fall 2022 BOD meeting
- ii. Establish training proposal for committee chairs and BOD

3. Improve external engagement to advance WOEMA's reputation as the leader of expertise and clinical quality in OEM.

a. Increase membership from other medical specialties and allied occupational professionals.

Lead: Lutine, Membership Committee Due: Q3 2024

KPI:

- i. Number (N) of other medical specialties and allied societies with whom relationships are formed

- ii. New members (N) and percentage increase in membership from these specialties and societies. Currently 48/510 are allied health professionals.
- b. Explore collaboration with other regional ACOEM components
 - Lead: Lutine, WOEMA President Due: Q2 2023
 - KPI:
 - i. Number of regional components where successful outreach has been completed
 - ii. Number of successful new collaborative efforts with other components
- c. Create WOEMA marketing strategy to promote WOEMA as leaders in OEM to local and regional stakeholders.
 - Lead: Lutine, Education Committee, Legislative Committee
 - Due: Q4 2022
 - KPI: Once marketing plan is established, number (N) of WOEMA members/leaders sought for expertise.
- d. Build relationships with public health professionals so WOEMA is recognized as an extension of public health in the workplace and other underserved areas.
 - Lead: Membership Committee, Education Committee, WOHC Committee
 - Due: WOHC 2023 (Q3 2023) and ongoing
 - KPI: At least one public health-focused topic to be included as a webinar per year and one public health session to be included at each WOHC 2023.

Key Issue: Advocacy: *Promoting the importance of OEM members by representing their voice and influencing the laws that impact our patients and members*

1. Increase recognition of WOEMA as an authority on workplace health and environmental health by policy makers, other stakeholders, and the public.

- a. Determine one focus area for WOEMA advocacy efforts to support and promote in occupational and environmental medicine.
 - Lead: Legislative Committee Due: Q2 2023 and annually thereafter
 - KPI: Number (N) of advocacy areas clearly defined and measured by feedback of two other committees and EC and/or BOD approval.
- b. Create the role of public information officer/media contact within WOEMA to talk about these issues
 - Lead: Legislative Committee with WOEMA President and Executive Committee
 - Due: Q3 2023

KPI: Recommendations to BOD on work plan, structure, and identification of PIO to speak for all WOEMA activities.

c. Create one op-ed piece or article in local media in all five states to educate legislators and the public.

Lead: Legislative Committee + Newsletter Committee

Due: Q4 2023 and annually thereafter

KPI:

- i. Number (N) of articles per WOEMA state sent to news outlets
- ii. Number (N) of op-eds/articles/white papers picked up by press

2. Expand advocacy efforts and media presence in all five WOEMA states

a. Incorporate advocacy efforts into WOEMA engagement in all five states.

Lead: Legislative Committee, Lutine, Membership Committee

Due: Q4 2022 – annually thereafter

KPI: N and percentage increase of new Legislative Committee members/attendees/ activity participants from each WOEMA state.

b. Develop relationships with the media in major markets of each WOEMA state to offer expertise on OEM/public health issues.

Lead: Lutine Due: Q3 2024

KPI:

- i. Number of media outlets with whom successful relationships built
- ii. Number of WOEMA members/leaders proposed
- iii. Number of WOEMA members/Number of times sought and used for their expertise

c. Improve member involvement in their medical societies of each WOEMA state to advocate for OEM.

Lead: Legislative Committee Due: Q1 2023

KPI:

- i. Number of members involved in each state medical society
- ii. Number of new Member reports at Legislative Committee meeting

3. Improve the systems and programs that our members work in on behalf of our members and their patients

a. Identify gaps that adversely impact the “system”

Lead: David Caretto Due: Q4 2022 and then annually

KPI: At least one gap identified per year

b. Identify a speaker or panel to address solutions that WOEMA and/or members can practically implement to improve the gap identified in 3.a.

Lead: David Caretto

Due: Annual Education Committee mtg at WOHC starting WOHC 2023 (Q3 2023)

KPI: At least one session on improving the system addressing the gap identified in 3a. above annually

c. Maintain/grow WOEMA leadership and membership buy-in and support on advocacy activities

Lead: Legislative Committee

Due: Q3 2022 and then quarterly reports on all external engagement

KPI:

- i. Number of newsletter articles with updates on developments and activities; Goal: one article each newsletter (6/year) on legislative developments and advocacy activities
- ii. Number of external activities reported to leadership (EC)

Key Issue: Equity: *Including diverse individuals in leadership and decision-making while recognizing and addressing social barriers to care*

1. Advance awareness of JEDI to internal and external stakeholders

- a. Establish a sustainable JEDI training program for WOEMA leadership (BOD Training) and a separate educational program for membership (e.g., webinars).

Lead: JEDI Committee, Education Committee, Lutine

Due: (1) BOD and Committee Chairs: Q1 2023 and then ongoing, at least q 3 years; (2) Membership: Q4 2022 for WOHC session and Q4 2023 for webinar then ongoing once a year webinar and, in addition, one session at WOHC.

KPI: Membership: education provided at least once a year. Leadership: 100% attendance at least q 2-3 years.

- b. Utilize WOEMA newsletter, emails, website, and social media to disseminate JEDI-related education and information to highlight WOEMA work to promote JEDI.

Lead: JEDI committee, Newsletter Committee, Website Committee.

Due: Q3 2022, ongoing annually thereafter

KPI: Number (N) of unique articles written that incorporate JEDI

- c. Establish expectations of meeting JEDI principles in WOEMA and WOHC activities (e.g., newsletter, education, legislation).

Lead: JEDI Committee with collaboration of all Committee chairs

Due: Q3 2023, ongoing annually thereafter

KPI:

- i. Number of newsletter articles that incorporate JEDI
- ii. Number of emails sent promoting JEDI values and issues and
- iii. Number of social media posts of JEDI issues and
- iv. Number of JEDI issues identified in work of all committees

d. Improve knowledge and acceptance of JEDI principles among members.

Lead: JEDI Committee with collaboration of all Committee chairs

Due: Q4 2023

KPI:

- i. Number of emails on JEDI-specific content opened by recipients
- ii. Number of newsletter emails with JEDI content opened
- iii. Number of clicks on WOEMA JEDI site
- iv. Number of JEDI social media posts opened/viewed/responses

2. Increase the pipeline of diverse individuals into OEM and WOEMA leadership.

a. Encourage residents/medical students to attend WOHC to present papers/posters on JEDI topics.

Lead: JEDI Committee, WOHC Chair Due: Q 4 2022

KPI:

- i. N posters submitted on a JEDI topic; goal: at least one for 2022, increasing for future WOHCs
- ii. Number of residents and medical students who attend and present and who meet diversity criteria identified in workplan

b. Investigate feasibility for a stipend to rotate through an occupational medicine residency program to advocate for and/or represent JEDI values.

Lead: JEDI Committee, Lutine Due: Q4 2023

KPI:

- i. Completion of feasibility study
- ii. Number of potential funding sources identified
- iii. Number of funders applied to
- iv. Recommendations created for sustainable source of funds.

c. Establish expectations that JEDI values will continue to be a factor when making WOEMA leadership decisions and award determinations.

Lead: WOEMA President, Nominating Chair, Awards Chair, JEDI Committee

Due: Q4 2022 (currently in bylaws) and ongoing annually; and to coincide with training in 1.a. above

KPI:

- i. Presence of JEDI team member in awards, nominating committees
- ii. percentage of WOEMA leaders and non-JEDI award recipients who meet established JEDI criteria

3. Advance JEDI principles as a fourth pillar of WOEMA.

a. Establish workgroup to review advisability of adding actual pillar(s) to WOEMA's existing three.

Lead: JEDI Committee, Executive Committee

Due: Q 3 2022- Q1 2023

KPI:

- i. President establishes workgroup
 - ii. Workgroup presents assessment and recommendation to board
 - iii. Board decides whether or not to add pillar(s) or to continue study
- b. Develop sustainable funding for JEDI activities, include formal recognition of donors, create and develop fundraising ambassadors.
 Lead: Lutine, JEDI Committee Due: Q2 2023
 KPI:
- i. At least \$2000 raised per year, stratified by funder type
 - ii. Number of donors per year
 - iii. Number of letters of thanks/acknowledgement sent/ percentage of donations acknowledged
- c. Establish ongoing annual call for member nominations for JEDI award.
 Lead: JEDI and Awards Committees Due: Q2 2022 and annually
 KPI:
- i. Number of JEDI nominations received per year
 - ii. Number of awards given, assessed over a five-year period (2022-2026)

Key Issue: Sustainability: *Ensuring financial stability and growth*

1. Increase traditional sources of revenue

- a. Explore and pursue process for ACOEM cost-sharing/labor to retain members who fail to renew.
 Lead: Lutine, WOEMA WOEMA President Due: Q2 2023
 KPI: Added revenue in dollars of members gained through this collaborative effort

- b. Determine a dues structure to encourage membership or offset operational costs.
 Lead: Membership Committee, Lutine Due: Q3, 2023
 KPI: Number of members added/ percentage membership increase as a result of revised fee schedule

- c. Review conference registration fees, current fundraising efforts, and simplify/modify structure.
 Lead: Previous WOHC Chair(s), Membership Committee, Lutine
 Due: Q1 2023
 KPI: Revenue generated (\$) compared to prior years after new fee structure, stratified by WOHC, committees, activities

2. Increase and diversify new sources of revenue.

- a. Establish educational grants for WOHC and WOEMA.
 Lead: Lutine, Educational Committee
 Due: Q3 2023 and ongoing annually
 KPI:

- i. Number of new grants applied for
 - ii. Number of successful applications
 - iii. Increase in revenue/grant support (\$) as a result of these grants
- b. Identify corporate sponsorship of newsletter, committees, other activities.
Lead: Rosalie Banasiak, Lutine Due: Q2 2023
KPI:
 - i. Number of corporate sponsors added
 - ii. \$ revenue generated
 - iii. Number of existing/new activities supported
- c. Promote legacy donations and corporate matching donations.
Lead: Rosalie Banasiak, Lutine Due: Q3 2023
KPI:
 - i. Number of outreach communications sent to membership
 - ii. Number of corporations to which outreach conducted
 - iii. Number of members signed up
 - iv. Number of corporations responding/percentage positive response
 - v. \$ revenue generated and categories of donors
 - vi. Number of new or expanded activities supported by revenue

3. Advance fiduciary responsibility, control: oversight, efficiency, transparency.

- a. Refine financial accountability process to ensure ongoing review, disclosure, and transparency around finances.
Lead: Economic Affairs Committee, Lutine
Due: Q3 2023 then annually, Fall BOD meeting
KPI:
 - i. Written accounting of methods used for legacy purposes
 - ii. Number of gaps found and type; goal is zero gaps by 2024
 - iii. Number of corrections/revisions made to accounting
- b. Create efficiencies to streamline expenses and complex management.
Lead: Executive Committee to create Task Force, Lutine
Due: Starting Q3 2022 and ongoing annually
KPI:
 - i. Creation of task force and prioritized list of issues to create efficiencies (Q3 2022)
 - ii. Timeline to address and bring decision to board (Q3 2022)
 - iii. Potential cost savings by decisions