



# 2020-2023 Strategic Plan

**Prepared by Leading Associations**

Jeff Arnold, MAM, CAE

Robert D. Spangler, MPA, CSC



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# Executive Summary

Based on board interviews and surveys, clear themes emerged regarding the future direction of NHCA. These themes led to the establishment of key strategic focus areas.

## Strategic Focus Areas

After deliberation, the board established four areas of strategic focus moving forward:

1. **Broaden Member Value:** Create and implement a plan to increase member value beyond the in-person conference.
2. **Optimize Governance:** Adopt enhancements to the governance system to keep the Executive Council (EC) on target with Strategic Goals, flexibility to respond to external challenges, and efficiently keep tasks/projects moving forward between board meetings.
3. **Expand and Leverage Industry Partnerships:** Establish and execute a process for identifying and prioritizing organizational outreach needs to enhance NHCA's profile, market programs and services, and find research and advocacy partners.
4. **Establish Financial Resilience:** Establish a system to develop and monitor a comprehensive financial management plan that allows a set amount in reserve in case of emergencies as well as funding to launch new initiatives.

# Overview

The National Hearing Conservation Association (NHCA) Board of Directors and staff met online on August 12, 17 and 19, 2020 to develop a strategic plan. Jeffrey Arnold, MAM, CAE, and Robert D. Spangler, MPA, CSC, of Leading Associations, were engaged to lead the planning process.

<b>Participants</b>	
<b>Executive Council:</b> Theresa Schulz, President Gayla Poling, President-Elect Amy Blank, Past President Theresa Small, Au.D., CPS/A, Secretary/ Treasurer Pegeen Smith, Director of Communication Vishakha Rawool, Director of Education Don Finan, Director of Membership Kathy Gates, DoD, Director of Marketing and Public Relations Elliott H. Berger, INCE.Bd.Cert., MS, FAIHA, Historian	Liz Masterson, Member Delegate Bankole Fasanya, Member Delegate Teah Richey, PSP Member Delegate Heather Malyuk, Commercial Member Delegate David Stern, Associate Member Delegate Christina Campbell, B.A., Student Member Delegate Merlyn Lubiens, Past President  <b>Staff:</b> Kim Gill, Executive Director

## Facilitation Schedule

### Day 1:

- Introductions /Ground Agreements
- Inventory
- Guiding Principles
- Strategic Lens (Mission/Vision/Values)

### Day 2:

- Strategic Lens continued
- Background Work (survey review)
- Prioritize

### Day 3:

- Establish broad goals, timelines and accountability
- Establish key milestones/objectives, timelines and accountability
- Guidelines for execution

# NHCA Strategic Lens

Every organization has a lens through which it views strategic decision-making. These include the mission/vision, values, culture, and core competencies. During the retreat, the Vision and Mission statements were both reviewed and revised. The revised statements are as follows:

**NHCA Vision (rev. 08-17-2020):**

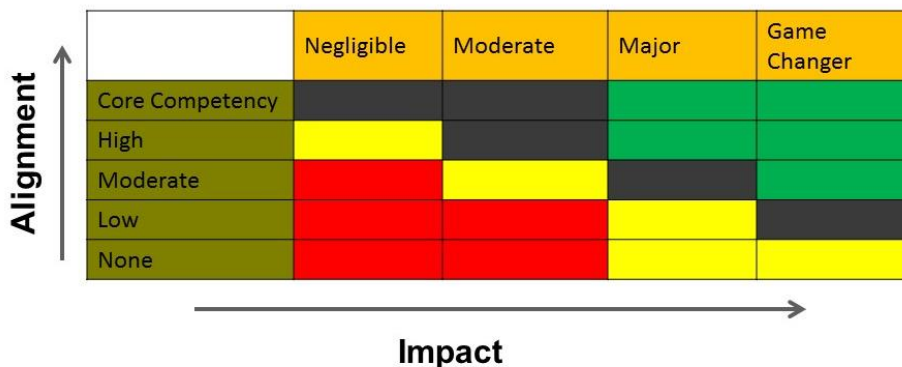
*To prevent hearing loss and other auditory disorders due to noise and secondary environmental factors in all sectors of society.*

**NHCA Mission (rev. 08-17-2020):**

*NHCA provides leadership, expertise, and education on hearing loss prevention strategies and services to the broader professional community and empowers and supports members through networking and advocacy.*

Another viewpoint the group was asked to consider focused on identifying items that have the greatest alignment with, and will have the greatest impact on, stakeholder value for resources invested. Alignment can be with your mission, your strategic priorities and whether you are the organization best positioned to address the issue.

The organization should focus its efforts in the upper right quadrant of the graph – or the “game changers” that are best aligned and most impactful.



# Background Work

## Previous Strategic Plan Review

Goal 1: Membership	
Key Accomplishments	Incomplete Initiatives
<ul style="list-style-type: none"> <li>See Strategic Goals Progress Report</li> </ul>	
<p><b>Carry Forward?</b> Yes, but more focused. Students in particular – conversion. AuD students. Focus on population we’re best reaching. Direct to scholarship foundation. PSP Category at risk. Audiology assistants and nursing. Marketing to audiologists</p>	

Goal 2: Communications	
Key Accomplishments	Incomplete Initiatives
<ul style="list-style-type: none"> <li>See Strategic Goals Progress Report</li> </ul>	
<p><b>Carry Forward?</b> Not as strategic focus as written. Continue as operational focus. Refocus consideration: Increasing position papers and guidance documents</p>	

Goal 3: Programs	
Key Accomplishments	Incomplete Initiatives
<ul style="list-style-type: none"> <li>See Strategic Goals Progress Report</li> <li>Have a Learning Management System</li> <li>Webinar task force is working to put together a total of 6</li> </ul>	
<p><b>Carry Forward?</b> Operationalizing the goal as written. Conference needs to be part of strategic focus. Be strategic in use of webinars, push forward quickly to feed the conference.</p>	

Goal 4: Budget and Finance	
Key Accomplishments	Incomplete Initiatives
<ul style="list-style-type: none"> <li>See Strategic Goals Progress Report</li> </ul>	
<p><b>Carry Forward?</b> Yes. Had finance committee looking at where we’re investing. With Covid, should we be using, protecting or building reserves?</p>	

## Situational Analysis – Surveys and Interviews

During the pre-retreat board interviews, questions were asked to elicit responses revealing NHCA’s internal strengths, weaknesses, opportunities and threats, unique value and ideal future state.

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Thoroughly researched and well thought out information on hearing conservation</li> <li>• Attract experts and researchers</li> <li>• Members encompass some of the most prominent in the field</li> <li>• Hearing conservation CEUs</li> <li>• Conference:               <ul style="list-style-type: none"> <li>○ Cutting edge educational sessions</li> <li>○ Good mix of research, regulatory, and best practice information</li> <li>○ Conference website is getting better</li> <li>○ Out-of-session time scheduled for interaction</li> <li>○ Conference committee is very active</li> </ul> </li> <li>• Culture:               <ul style="list-style-type: none"> <li>○ Acceptance, inclusion, authentic, unpretentious</li> <li>○ Camaraderie</li> <li>○ Long-lasting professional friendships</li> <li>○ Welcoming</li> </ul> </li> <li>• Leadership:               <ul style="list-style-type: none"> <li>○ Good teamwork among the members of the EC</li> <li>○ Strong leadership within the trio</li> <li>○ Membership and leadership reflects a diverse group of experts</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Gaining new membership</li> <li>• Reaching out to both the health community and the general population</li> <li>• Social media</li> <li>• Balancing focus areas – can become military focused and seems really audiologist heavy</li> <li>• Membership perks may be perceived as lower value</li> <li>• Primary focus on occupational settings/exposures, yet vision and mission is for all sectors</li> <li>• External communication to other Public Health/Preventive Medicine organizations</li> <li>• Value proposition:               <ul style="list-style-type: none"> <li>○ Member/non-member differentials and programs/resources outside of the conference</li> <li>○ Other than discounted meeting attendance, value of membership is not clear</li> </ul> </li> <li>• Conference programs have variable quality</li> <li>• Retention of student members</li> <li>• Member recruitment/retention</li> <li>• Little wiggle room in the budget; lack long-term protection</li> <li>• Keeping members engaged between conference</li> <li>• Having resources to do the work we want to do, e.g., peer-reviewed journal</li> <li>• Leadership has trended to hearing conservation professionals lacking skill sets in business management</li> <li>• Governance challenges:               <ul style="list-style-type: none"> <li>○ Focus on strategy, stay out of the weeds</li> <li>○ Only meet 3 times/year – committees not setting up meetings between meetings</li> <li>○ Spend a lot of time rehashing</li> <li>○ Holding people to promises is more important than plan itself</li> <li>○ Lack of bench-strength; recycling</li> <li>○ Individuals serving multiple roles</li> <li>○ Lack of continuity in leadership</li> <li>○ Limited pool of members eligible to run for three-year term of the president-elect/president/past president</li> </ul> </li> </ul>

Opportunities	Threats
<ul style="list-style-type: none"> <li>• Technology: <ul style="list-style-type: none"> <li>• Virtual outreach such as the conference</li> <li>• Webinars</li> <li>• Online offerings</li> <li>• Better use of social media, videos and Learning Management System</li> <li>• Create virtual content for universities' use in AuD, music, and perhaps other programs</li> </ul> </li> <li>• Growing interest in recreational hearing protection from the general population</li> <li>• Expand membership to include other professionals</li> <li>• Looking at what hearing conservation efforts will be 10 years from now in order to get ahead of the curve</li> <li>• Identify dedicated actions to be accomplished by ad hoc working groups</li> <li>• Increase PSP member participation/benefits – more business support services, such as training videos</li> <li>• Broaden scope – environmental health and safety managers, occupational health nurses and physicians (so many more people involved in hearing conservation)</li> <li>• Going to schools and associations to increase our visibility</li> <li>• Increase sponsorship opportunities</li> <li>• COVID-19 <ul style="list-style-type: none"> <li>• Provide key information to help folks in the field and increase our visibility</li> <li>• See results of membership survey:</li> <li>• Variety of resources sought</li> <li>• Safety guidelines and best practices</li> <li>• Resources to navigate return to work</li> <li>• Position statements</li> <li>• Online forum</li> <li>• Infection control and telepractice information</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Covid-19: <ul style="list-style-type: none"> <li>• Economy</li> <li>• Travel restrictions for members organizations and businesses</li> <li>• Pandemic has decimated many members</li> <li>• Working together but apart has inherent disadvantages</li> <li>• Will NHCA become a “want” as people deal with “wants vs. needs”?</li> </ul> </li> <li>• Other organizations competing for membership</li> <li>• Commercial/sponsorship</li> <li>• Telehealth - adapting quickly for the future</li> <li>• Oversight/regulations in the primary realm</li> <li>• Maintaining multi professional membership within the organization</li> <li>• Increase of virtual meetings and less perceived need long-term for an in-person conference</li> <li>• Other organization offering CEUs to this group</li> <li>• Funding has gotten tighter</li> <li>• Other organizations have much better visibility in disseminating information to the public</li> <li>• Declining membership / declining corporate membership</li> <li>• Interesting enough talented leaders to participate</li> <li>• Mergers</li> <li>• Financial viability</li> <li>• Aging membership</li> <li>• Prospective members making decisions relative to cost for value</li> <li>• Complacency – used to seek answers to solve emerging problems; now seem comfortable with ready-made answers</li> <li>• Administration of local HCP’s delegated down, assigning responsibility to unqualified/uninformed personnel</li> </ul>

**Unique Value:**

- Hearing conservation education and networking
- Expertise in hearing conservation
- Diverse membership that spans multiple specialties / experts in all aspects of HC (IH, OH, PM, AuD, safety)
- Conference specific to hearing conservation
- Unique mix of attendees from government, military, and academic institutions
- Size allows for real relationships, tight-knit community



- Responsive to members
- For those choosing hearing health care career path, it's the only forum that is singularly focused and has a diverse network of like-minded professionals

#### **Additional Ways to be of value:**

- Expand scope related to education at the university level
- Expand focus to environmental noise concerns, musicians, children's health
- More year-round opportunities / interactive communications
- Remote offerings of content -- conferences, classes, best practice sharing sessions, etc., via live streaming events
- Advocacy, position papers
- Evidence-based guidance documents and clinical consensus documents
- Data to support better diagnostics and earlier intervention for hearing loss prevention
- Initiate a quarterly scientific journal

#### **Ideal NHCA Five Years from Now:**

- Huge active membership
- Increased membership and diversity of members
- More inclusive with equal representation of all health and safety or acoustics professionals
- A robust organization covering many different aspects of hearing conservation (e.g., academia, research, service delivery, etc.)
- Two-way conduit for information
- Quarterly town halls on a variety of topics
- Dedicated and engaged membership
- Multiple evidence-based documents that promote best practices
- Multiple educational tools that inform and attract students
- Active lobbying for better diagnostics, early intervention, and better protection of workers
- Database connecting scientists with study populations to facilitate better science and stronger evidence to support lobbying and advocacy efforts
- Bigger public face accomplished by increasing information offerings
- Better follow through on planned activities
- Continue thinking outside the box to strengthen the organization mission and vision
- Better diversification of non-dues revenue
- Membership growth and recruiting younger members into the organization
- Peer reviewed Journal – Journal of the National Hearing Conservation Association online – similar to JAMA-online
- Conference that celebrates how our focus over the past 50 years is resulting in a nation of people who view preserving the ability to hear as a value to be achieved, not just another item on a health care checklist

## Strategic Considerations and Priorities

Based on the results of the market analysis and board survey, key areas for strategic consideration were developed. Additional questions to consider were added to the list during the retreat. The Board and staff worked together to determine their top strategic concerns based on these considerations.

### Key Strategic Considerations:

- Which new types of professionals should we seek out to increase membership?
- Should we expand our HC focus into other settings beyond current areas?
- How can we leverage outreach to other organizations to enhance our public profile?
- How do we establish long-term financial sustainability?
- How do we create a member value proposition beyond the conference/ keep members engaged between conferences?
- Should we offer a peer-reviewed journal?
- Should we increase our visibility and value with universities?
- Should we engage in lobbying, advocacy, and additional position papers?
- Should we focus more information, guidance and research data resources?
- How do we optimize our governance system for efficiency and productivity?
- How do we best respond to the short-term and long-term impacts of Covid?
- How do we better meet the needs of PSP and commercial members?
- How can we better support student members and younger members?
- How do we take advantage of opportunities in telehealth?
- How do we best respond to an aging membership?
- How can we best leverage technology?
- Are there organizations we should partner with to increase our reach?

### Top Strategic Concerns identified:

1. Broaden member value
2. Optimize governance
3. Expand and leverage partnerships
4. Establish financial stability

# Strategic Goals

## Goal # 1: Broaden Member Value

*Create and implement a plan to increase member value beyond the in-person conference, focusing initially on immediate resources for Covid impacts, and prioritizing key offerings and opportunities for PSP, Commercial, and Student/early career members.*

**Owner:** Director of Membership and Director of Education

**Timeframe:** Plan presented for board approval Fall EC meeting  
Bi-annual evaluation of perceived value

### Key objectives/Milestones

1. Develop a Young Professionals Committee to work on student and young professional recruitment and retention. (This Committee could provide student and young members with a nice leadership opportunity)

**Owner:** Director of Membership/Student Delegate

**Timeframe:** Submit a proposal by Oct EC meeting outlining broad plan  
Submit defined objectives and action plans by December 15

2. Develop a process to engage PSP members to gather input to further initiatives that increase membership value for this membership group.

**Owner:** Director of Membership/PSP Member Delegate

**Timeframe:** Submit a proposal by Oct EC meeting outlining broad plan.  
Submit defined objectives and action plans by December 15

3. Develop a process to engage Commercial Members and gather input to further initiatives that increase membership value for this membership group.

**Owner:** Director of Membership/Commercial Delegate

**Timeframe:** Submit a proposal by Oct EC meeting outlining broad plan.  
Submit defined objectives and action plans by December 15

4. Develop a plan beyond 2021 for Webinars that are a perceived value for current members and may attract non-members.

**Owner:** Director of Education and Webinar Task Force

**Timeframe:** Develop a plan by Summer EC meeting with input from webinars done during late 2020 and early 2021

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## Goal # 2: Optimize Governance

*Adopt enhancements to the governance system to keep the Executive Committee (EC) on target with Strategic Goals, flexibility to respond to external challenges, and efficiently keep tasks/projects moving forward between board meetings.*

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**Owner:** Presidential Trio

**Timeframe:** Draft plan to board by Oct EC meeting  
Review progress at summer2021 EC meeting

### Key objectives/Milestones

1. Conduct a governance review to provide recommendations on policies, procedures and systems, including reviewing P&P for possible revision/simplification, as well as key items from rEvolutionary Governance® Handbook (Stage 3 and/or 4).

**Owner:** Presidential Trio

**Timeframe:** Submit a proposal by Oct EC meeting outlining broad plan.  
Submit defined objectives and action plans by December 15

2. Create roles and responsibilities documents for those who follow you in your position.

**Owner:** Each member of EC

**Timeframe:** Submit a proposal by Oct EC meeting outlining broad plan.  
Submit defined objectives and action plans by December 15

3. Develop meeting, follow-through, and accountability protocols and train EC on the protocols.

**Owner:** Presidential Trio with Civica

**Timeframe:** Present plan at Fall EC Meeting and conduct the training within 30 days of the meeting

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**Goal # 3: Expand and Leverage Industry Partnerships**

***Establish and execute a process for identifying and prioritizing organizational outreach needs to enhance NHCA's profile, market programs and services, and find research and advocacy partners.***

On an annual basis, identify partner within a target membership market and select:

- One organization we can partner with on an advocacy initiative
  - One organization to partner with on educational offering
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**Owner:** Executive Council

**Timeframe:** Annually at summer conference

**Key objectives/Milestones**

1. Research possible partner organizations (identify overlap)
2. Create weighting criteria based on organizational priorities.

**Owner:** Leadership Advisory Team (LAT)

**Timeframe:** Introduce to LAT at September meeting

Have weighting criteria and document format by December 15

3. Identify and execute specific initiative areas for advocacy campaigns; webinars; position papers, and member development efforts where we can partner with that organization.

**Owner:** President Elect to Coordinate, NHCA Liaison to identified organization to execute

**Timeframe:** Spring 2021 EC Meeting

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**Goal # 4: Establish Financial Resilience**

***Establish a system to develop and monitor a comprehensive financial management plan that allows a set amount in reserve in case of emergencies as well as funding to launch new initiatives.***

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**Owner:** Treasurer and Civica

**Timeframe:** Between November 2020 and February 2021

**Key objectives/Milestones**

1. Determine the amount that needs to be in reserve to address emergencies.

**Owner:** Treasurer and Civica

**Timeframe:** By November 2020

2. Establish a system to invite new initiatives.

**Owner:** Management office

**Timeframe:** Once a year concurrent with the end of the conference

3. Establish a system to prioritize new initiatives and seek approval from Exec council.

**Owner:** President Trio

**Timeframe:** Sixty days after the annual survey results are available

4. Calculate the dollar amount necessary for new initiatives.

**Owner:** Treasurer and the financial task force

**Timeframe:** 30 days after approval of new initiatives

5. Create and distribute an Annual Report for the membership

**Owner:** Treasurer/President

**Timeframe:** One month prior to the Annual Business Meeting

## Next Steps

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It is important that NHCA keep this effort alive and moving forward. Ensure that the goals are validated by the Board and that they **are included at the top of each board meeting agenda and integrated into a Board Pacing Calendar.**

Strategic conversation is not just for retreats. Strategic conversation should be ongoing. Strategy making is a process, not an event. The board should continue to tell the story (that is, WHICH path we choose and WHY), and evaluate mindset and attitudes regarding the strategic focus areas.

### **How We Hold Each Other Accountable:**

- Identify the owner of each key initiative to report on progress
- Communicate expectations to key volunteers/staff associated with initiatives
- Presidential Trio to get information out to the EC setting expectations
- Establish a timeline based on the outcomes of the meeting
- Follow up email to the staff/volunteers associated with the initiatives to provide feedback