

Charting the Course



A Strategy for Advancing the Agenda of the Association of Medical Microbiology and Infectious Disease Canada

**Output from the Strategic Planning Workshop
Toronto, Canada**

December 11-12, 2004

Introduction and Background

Approximately one year ago, the Association of Medical Microbiology and Infectious Disease Canada (AMMI-Canada) was formed from two organizations. The December 11-12, 2004 strategic planning workshop was the first time that Council members convened to chart AMMI-Canada's future direction.

Prior to the workshop, AMMI-Canada made the wise decision to conduct a member survey in order to hear what was on their members' minds. Highlights from the recently compiled research results were presented to the Council and formed the basis of discussions about how to best develop and articulate this vision.

This report summarizes the results of the strategic planning workshop. It has been divided into two sections. The two-day workshop was designed and facilitated by Ken Thacker, Managing Partner of the Association Resource Centre Inc., a Toronto-based management consulting firm that specializes in meeting the needs of the not-for-profit sector.

The final product of the workshop is a set of potential initiatives and preliminary action plans for moving ahead. Currently "owned" by the Council, the next step will be to take these initiatives to the members and get their commitment. Only by actively involving the members will AMMI-Canada succeed in charting a relevant agenda for their future.

An exciting new vision is starting to evolve for AMMI-Canada and, as others begin to participate in the strategy development process, this vision will continue to evolve. The resulting plan will be one for which there will be a strong consensus. In the long run, these strategies and action plans will need to deliver on this vision.

To set the stage for articulating AMMI-Canada's future, the workshop participants were challenged to visualize the type of organization they would like AMMI-Canada to become if there were no constraints. Following is their vision:

- **The organization of choice for people in the fields of medical microbiology and infectious disease.**

AMMI-Canada needs to be nationally recognized as the collaborative hub for practitioners and researchers in the profession. Association members are the recognized experts in medical microbiology and infectious diseases and their impact on human health.

- **Answering the needs of members**

The association will provide an environment where members will benefit from interaction with peers and from networking opportunities. It will be an organization that speaks on behalf of its members, an organization that influences public policy and decision making.

- **Enabling major research projects to happen**

With the support of its diverse membership, AMMI-Canada will seek to promote research in all areas pertinent to our discipline, including but not limited to clinical care, diagnostics, mechanisms of pathogenesis of infectious diseases, treatment, infection control, public health and education. In addition, it will be an association that will play a key role in sourcing research dollars, setting research priorities and influencing funding organizations.

- **Influential and highly respected**

AMMI-Canada aspires to be the Canadian equivalent of the American Society for Microbiology or the Infectious Diseases Society of America. AMMI- Canada's annual conference will one day be viewed as the premier conference in the field in Canada.

Workshop participants believe this is a realistic and achievable vision.

Workshop participants were challenged to articulate why AMMI-Canada exists. The following mission statement resulted:

AMMI-Canada exists as an organization with the primary function of representing the broad interests of professionals dealing with human microbiology and infectious disease in Canada.

Through promotion of the diagnosis, prevention and treatment of human infectious diseases and by the involvement of practitioners in the field through education, research, clinical practice and advocacy, AMMI-Canada aims to protect and educate the public and also to further the career opportunities of its members through professional development and advocacy initiatives.

AMMI-Canada's membership currently consists of medical microbiologists, infectious disease physicians, PharmD's and PhD's with a clinical or research focus in our disciplines, and medical trainees in the specialties of Infectious Diseases and Medical Microbiology . Over time, the association may move to encompass a broader community which includes non-medical public health professionals, Infection Control Practitioners and Medical Laboratory Technologists, but does not currently represent these constituencies.

To that end, the Council agreed to focus on its current membership at this time and on how AMMI-Canada can best represent their interests. Because the mission statement will drive a number of AMMI-Canada's strategic initiatives, it is important to know if the successful implementation of these strategic initiatives is producing the desired results. The following targets will be used to determine how effectively AMMI-Canada is delivering on its mission:

1. Member satisfaction with AMMI-Canada will reach 67% by 2010

The current benchmark satisfaction rating is 62%. Workshop participants felt that a 5% improvement over five years was a sufficient "stretch" and was yet an attainable goal. This increase will also move the satisfaction rating from one categorized as "marginally satisfied" to a rating that translates to a "reasonably satisfied" membership. The key here will be for AMMI-Canada to communicate the survey results to the members, let them know what it intends to do about them and then report back on progress.

2. Net membership will grow to 575 by the year 2010

Achievement of this target will require a net membership increase of 75 after allowing for members who retire and/or terminate their membership. Future growth is expected to come from the current influx of new trainees and the potential bank of unsolicited non-members, which includes PhD's and out-of-country specialists.

3. Market Share – target to be determined

Further research into the actual number of member and non-member practicing professionals in Canada is required to set an accurate baseline.

4. Impact on infectious diseases - not easily quantifiable

The problem in measuring the association's impact on infectious diseases was deemed too difficult and too expensive to address at this time. Surveying the public, for example, can be a very expensive exercise. The benchmark will be kept as a guideline for future activities, however, and can perhaps be paired with other organizations' measurements at some later date.

5. Financial - 1 year's operating expenses

The aim is to have reserves equal at least to one year's operating expenses

What the Members Are Saying

Overall, the workshop participants were pleasantly surprised and pleased with the results of their recent member survey. In particular, they felt that the 62% benchmark satisfaction rating was a good starting point for AMMI-Canada to move forward, particularly given the newness of the organization. They reached the following conclusions from the research:

- AMMI-Canada is doing better than expected and its members are generally optimistic with regard to the organization.
- Communication, communication, communication! AMMI-Canada needs to focus on, and invest in, communicating effectively and regularly to its members. This will be critical as the organization moves forward. Also important is the need for communication to AMMI-Canada's external stakeholders. The Foundations also have a need for more effective communication initiatives.
- There is an important and timely window of opportunity now available for AMMI-Canada to demonstrate the value of membership and to produce subsequent results. While it is still new, AMMI-Canada should move quickly and demonstrate the organization's agility and responsiveness in this regard.
- A priority concern among members is the issue of advocacy with regard to human resources issues.
- In the past, it may have been difficult to recruit volunteers; but, survey feedback indicates that there is currently a lot of member energy waiting to be harnessed within AMMI-Canada. Members are saying that they want to be more involved with committees and in other related areas. In order to tap into this valuable resource, it will be necessary to develop methods to inform members about specific opportunities and openings and make it easier for them to participate.

- AMMI-Canada's Annual General Meetings have a strong and positive history and the organization needs to ensure that these high standards are maintained and continually improved. An important related need is the member interest in continuing medical education opportunities.
- Preliminary strategic goals have already been identified by AMMI-Canada and the survey results confirm that these goals are consistent with member priorities.
- As a forward-looking association, AMMI-Canada must seek to create a more inclusive member organization. It must ensure that members feel they can easily contribute to and influence AMMI-Canada's future direction.

Workshop participants broke out into separate teams to identify and evaluate future issues and opportunities in several relevant areas:

Training and Educational Requirements

The Royal College of Physicians and Surgeons wants to decrease the number of specialties, and therefore, the number of examinations it has to administer in addition to limiting most programs to a maximum of five years' of training. The general strategy that it is espousing is to create a limited number of entry streams from medical school, i.e. approximately four; medicine, surgery, pediatrics and laboratory medicine, each having a common core competency training period followed by three years of specialty training. These core programs would probably be followed by national examinations. The fate of specialty exams is not known, but the RC would like to decrease the number significantly because of cost issues. The effects of these initiatives are:

- There are ramifications, at the university level, by limiting academic roles and contributions, with implications for teaching and research.
- There is a limited flexibility of job profiles and the potential elimination of internal medicine and pediatric qualifications. This would create a problem for practitioners in hospitals that require them to have duties in both internal medicine or pediatrics plus their specialty interest.
- There is the likelihood that these initiatives will decrease recruitment into both Medical Microbiology and Infectious Diseases. This would be contrary to

7

the stated needs of Canadian society today, as outlined in the Naylor and Walker reports, commissioned to look into the ability of the health care system to respond to infectious disease challenges such as SARS.

- The changes in training programs proposed by the Royal College would have the effect of limiting the scope of training in our specialties by diluting it with core training in areas that are not essential to our knowledge and expertise, at the expense of enhanced training in critical areas of our specialties such as infection control, molecular diagnostics, molecular epidemiology, public health, research training, that is afforded by the 5th year of our current training programs.
- There is an impact on recruitment and human resources issues. There is the possibility, within the community, that the requirements for both qualifications will discourage people from entering the medical microbiology and infectious disease specialties. Students could potentially be discouraged by the general increase in the cost of medical school, the expected remuneration once they qualify, the inflexibility of switching between training programs and the need to make an early decision about specializing.

Human Resources in the Profession

The expected trends over the medium term include:

- Strained human resources, as the need for practitioners in our profession continues to outstrip the supply of trained medical microbiologists and infectious disease physicians.
- A decreasing number of solely-trained medical microbiologists (MDs) due to impaired recruitment related to training program issues (see above).
- An increase in the number of clinical microbiologists (PhDs).
- People will start moving outwards from academic and major urban centers into medium-sized communities. This trend is already apparent among the trainees who have recently been emerging. It is also important to note in this regard that the College is pushing for community-based training.
- Demographics within the field will change due to the aging of the profession's first generation and the start of the second generation's move into retirement.

The impact of these trends on AMMI-Canada is a changing membership mix. It is imperative to begin actively recruiting people from the PhD and microbiology communities and there is also a need to re-focus attention on community-based practitioners and what they want from a professional organization. More continuing medical education activities and less in grant research are possible examples.

Healthcare Environment

- Non-human resources, which are dependent on the level of available funding - the consolidation of laboratories, for example, has both a direct and indirect impact on members. Despite consolidation, however, quality of care must be maintained. In addition, there are issues regarding maintenance of standards of practice, with the push to have certain rapid diagnostic screening tests performed in satellite laboratories, doctor's offices or pharmacies.
- Working environments and the perceived value of infectious disease and medical microbiologist specialists to their employing organization and the decision makers - there is a need to take advantage of this perceived higher value.
- Patient safety and medical legal issues, such as trends in the general medical area related to errors, as well as infection control and what patients should be told about a particular risk. The medical legal issue is currently more of an American issue but is now starting to creep into Canada. Examples of areas of concern might include the legal implications of provision of telephone consultations and expanded consultative activities, such as in telehealth services.

Funding Sources

A number of existing and potential funding opportunities exist for AMMI-Canada. They include:

- Member dues, which represent a great potential source of revenue, although they will always be a small percentage of what is needed to sustain programs, services and initiatives.
- Sustaining members, who represent a diversity of opportunities in areas such as diagnostics, therapeutics and technology. Mergers, however, such as those formed by pharmaceutical industries, have left a shallower pool from which to draw.
- Government and health agencies representing areas of opportunity, particularly with increased visibility for infectious diseases, the threat of a major pandemic and the creation of the Public Health Agency. With increased competition for funding, AMMI-Canada will need to learn strategies and techniques in submitting funding applications to these organizations.
- AMMI-Canada conferences and events, which have a good reputation and are a primary focus for key audiences. The challenge is to take “a bit of a gamble” here by enhancing programming and to spend some money in order to make more money.
- The Journal, which is a well respected and guaranteed source of income, although small.
- Accreditation and its great potential to grow.
- Endorsements as an untapped potential.

Potential for Emerging Infectious Diseases

The reality is that a major pandemic, such as a pandemic influenza, is inevitable. The real question here is the degree of preparedness, and the role to be played in this respect by AMMI-Canada.

- Public expectations have largely been shaped as a result of what happened during the SARS situation last year. AMMI-Canada could address some key research issues, such as surveillance, preparedness and ethics. It could already have a role in telling the public that when a crisis such as SARS happens again, there has been very little substantive change in our preparedness. The distribution of information to front line people in such a situation will be key and there will be a role for AMMI-Canada to play in this regard.
- The issue of properly allocating financial and personnel resources, and ensuring that the quantity of resources is adequate during such a situation is also important to consider.
- AMMI-Canada needs to develop a public relations strategy that would enable it to position itself appropriately in the case of such an event. The association should have the capacity to respond and ensure that it focuses the attention on AMMI-Canada rather than on specific individuals. The public is looking for an independent and honest broker and AMMI-Canada could fill that role.
- AMMI-Canada could explore links through the new public health agency.
- AMMI-Canada should lobby the appropriate powers and promote the need for rehearsals and table top demonstrations, as well as participate in emergency preparedness exercises.

Future of Strategic Alliances

AMMI -Canada and its potential alliances are closely tied to funding issues. As funding sources become increasingly scarce, it will be imperative to team up with other organizations. Without alliances, results may include decreased attendance at events, less available financial resources, a decrease in desire for non-members to join as well as a minimization of importance attributed to AMMI-Canada by external stakeholders.

The outcome of positive alliances will initiate a snowball effect in attracting other groups and individuals with different backgrounds because it will create networking opportunities and new contacts, not to mention possible research funding and a good exchange of information.

Demographics and Public Attitudes

We can predict that emerging and existing infectious diseases will continue to challenge the health care system and the population at large. In addition, increasing numbers of immune-compromised people who are vulnerable to a large number of unusual and/or difficult to treat infections can be expected. There is increased health care funding, but this is matched with a higher level of competition for health care dollars. This may be a two edged sword. As increased funding flows to support research and management of cancer, for instance, it could consequentially take away from the focus on infectious diseases.

Immigration and global travel trends mean that Canada is experiencing more diseases that are common to other areas of the world, i.e. tropical diseases. With the increasing awareness about these diseases, AMMI-Canada's role might be to advocate with Health Canada for funding and more education.

The public has zero tolerance for so-called medical errors or adverse outcomes related to nosocomial infections and outbreaks. AMMI-Canada has a leadership role in antibiotics, public advocacy and research.

Potential Strategic Initiatives

As a basis for moving forward, AMMI-Canada will pursue four major strategic initiatives.

1. Evolve AMMI-Canada into a truly member driven association in which end-users play a key role in defining and advancing our mutually shared vision and strategy.
2. Work collaboratively where appropriate with allied organizations to significantly influence the public, government and key decision makers about infectious diseases and the need to ensure the profession is at all times adequately resourced and disaster-prepared.
3. Raise the profile of our profession and our contribution to the health of Canadians, both with the general public and among our own professional community.
4. Ensure there are adequate funding sources as well as the capacity to promote major research and education initiatives.

Following are some initial implementation ideas in support of these initiatives:

Initiative 1:

Evolve AMMI-Canada into a truly member driven association in which the end-users play a key role in defining and advancing our mutually shared vision and strategy.

Implementation Ideas

- Repeat the membership survey at a later date, after certain initiatives have been launched.
- When it comes to communicating with members, focus on methods that are easy, comfortable and that are “real time.” Use frequent communication vehicles that do not overburden members. For example, create catchy communiqués that focus on a specific topic, such as “How AMMI-Canada Spends Your Dollars” or “Results of the Strategic Planning Workshop.” When we want a reading on certain issues, email out one-question surveys and ask for feedback. This method can be very effective in inviting member participation with minimal effort.
- Enhance the role of the association’s Councilors when it comes to serving their geographic constituents through brief and timely communication between the Councilors and their constituents. For example, after Council meetings, Councilors can go back to their constituencies to summarize the issues with the members and give them an opportunity to provide feedback. This is a great way to find out whether our initiatives are serving member interests or not and is also a very effective way to keep members informed and make them feel that they have an impact on the goals of the organization.
- Ask members what they want from AMMI-Canada. One way to gather this information is to create a “real time” bulletin board in the members-only section of the web-site, where members can provide feedback.

- Create alliances with pharmaceutical companies in order to provide electronically delivered information regarding problems related to their products (e.g. Ask an Expert).

Initiative 2:

Work collaboratively where appropriate with allied organizations to significantly influence the public, government and key decision makers about infectious diseases and the need to ensure the profession is at all times both adequately resourced and disaster- prepared.

Implementation Ideas

- Identify allied organizations, along with their key contacts within the healthcare and regulatory landscape.
- Identify issue-specific and geographically-specific alliances so that when issues arise in those areas, AMMI -Canada can quickly identify its potential collaborators.
- Become the key media source for medical microbiology and infectious disease issues. The AMMI-Canada Communications Manager will channel all requests appropriately and AMMI-Canada will also possess a rapid response capacity for questions as they arise in the short cycle of news events. This includes a list of members who are identified as AMMI -Canada spokespersons who can be contacted for their particular area of specialty. Back-up names should also be available if the primary contact is not immediately available.

Initiative 3:

Raise the profile of our profession as well as our contribution to the health of Canadians, within the general public and in our own professional community.

Implementation Ideas

- Educate the public and the profession about diagnosis, prevention, treatment and research.
- Determine our various audiences. These will include segments of the population such as: the general public, national medical associations, provincial medical associations, provincial governments and the federal government.
- Employ various communications vehicles, to get the message across. These will include the organization of annual meetings, ameliorated media relations and a system of knowledge transfer.
- Create a panel of experts who can be called upon to talk to the media and the public on various issues. Consider organizing media training for the people who will be in those roles.

Initiative 4:

Ensure that there are adequate funding sources and a capacity to promote major research and education initiatives.

Implementation Ideas

- Develop a succinct profile on what the profession is going to need in order to achieve these goals. AMMI-Canada must be ready in this case to go to funding sources such as the federal government, provincial funding agencies, the CIHR and non-governmental organizations such as pharmaceutical companies. AMMI-Canada must ensure that medical microbiology, infectious disease and AMMI-Canada's research work are kept at the forefront of those organizations that have money.
- Develop a communications plan that captures a message which can be taken to potential funding sources to tell them what AMMI-Canada and its foundations are already doing and what opportunities may exist for the future. The plan must include support material comprising things like a business case and promotional material, which will present the case for the funding. Whatever is developed for this purpose should be different from the materials prepared for the public.
- Develop and implement a public relations campaign to alert the public about the story. Getting to the public could be cost prohibitive because a public relations campaign may require outside expertise. There may be other options that could be harnessed less expensively. Creative ideas, such as a timely and relevant press releases, will also help to get the message out. Appropriate spokespersons should be ready and able to speak on behalf of AMMI-Canada at all times.

Next Steps

Now that the Council has formulated a preliminary set of strategic initiatives, the next important activity is to seek member input and involvement. It is very difficult to implement a strategic plan that encompasses only a Council's vision.

It is certainly beneficial that AMMI-Canada was proactive in surveying its members. This means that the research results are already available as the strategic planning process is rolled out. It is now very easy to go back to the members with a message that says AMMI-Canada solicited member feedback, has listened and now has created a package that it believes is ready to share with the membership.

Workshop participants are already in agreement about how the plan can work at the Council level. In fact, they articulated a vision for how they would like the Council to function in the future. They want Council members to reflect the diversity of membership with regard to things like seniority-level. They will focus on member needs and be accountable to the end-user. They will come to meetings with a purpose, leave with common goals, and will be brimming with ideas to help move the AMMI-Canada vision forward.

Council members will ensure that all members are equal and that they listen to and have mutual respect for one another. Council members will be collaborative and not hierarchical, always ensuring that they all feel they are on an even keel and included in decision-making processes, which will be transparent. Council members' ideas will contribute to a synergistic process and each member will take ownership of their decisions and actions.

Getting the members excited is the next real challenge. And this has to be done fairly quickly so as not to lose momentum. It can be accomplished through creative "packaging" and an element of pizzazz and hype, with a consistent look or use of a slogan such as "AMMI-Canada 2010." Consistent messaging helps to capture the members' attention and will help to produce faster results – something the members will be keenly watching for.

The AMMI-Canada Council is to be congratulated on a job well done. In a short amount of time, it has succeeded in developing and creating some excellent material that can now be taken to the broader membership. AMMI-Canada members will be the beneficiaries of the proactive leadership that has been demonstrated by the Council during the two-day planning workshop. Congratulations on your hard work and efforts!