



Association Planning & Concentration of Energy/Effort Dynamic

FINAL
January 2017

NOTE: Recognizing that every component listed below works for NYHIMA *throughout* the year, this Gantt Chart serves to show the concentration of effort in order to assist the association's leadership in creating a more effective work flow and pragmatic annual schedule.

Component	Jan	Feb	March	April	May	June <i>Annual Conference Month</i>	July <i>FY & MY begin July 1st</i>	Aug	Sept	Oct	Nov <i>Election Month</i>	Dec
<i>Monthly Focus Notes →</i>												
Membership Renewals & Services					Initial Renewal Notice (Electron)		Renewals processed on rolling basis		Follow-up Renewal Notice (Mailed)			
Education & Professional Development						Conference Program	AHIMA Leadership Symposium			AHIMA HOD & Convention		
Leadership On-Boarding						Board Orient. @ Conference	Get new team into place →	Solicitation of Board Candidates	→		Ballot Distributed	
Board of Directors; Committees & Task Forces							New Board Starts →		Formally launch Committees	NYHIMA Reps to AHIMA HOD & Convention		
Budget Process							Fiscal Yr. begins	Budget Reviewed/ Approved				
Conference Planning						Conference Held			Planning cycle formally begins →			
Government Affairs	New Leg Session/ Albany		AHIMA Hill Day in DC							State Track Training		

THE VISION

To be *the* organization of choice for all health information managers in NYS.

THE MISSION

To promote the professional excellence of NYHIMA members through education, advocacy, and alliances and to offer an exceptional assortment of members-only benefits and professional resources.



STRATEGIC PLANNING PROCESS

2017 – 2019

OUR VALUES

Belief in Strong Health Information Management System

A strong health information management system enhances our profession and work of our employers.

Member Focus

Meet the needs and exceed the expectations of members.

Integrity

Act ethically with accountability for life-long professional development and commitment to excellence.

Collegiality

Helping each other through the collective wisdom and experience of the membership.

We promote the “water cooler” experience for all members.

Innovation

Embrace change with creativity and strategic thinking.

GOALS

ENGAGE & EDUCATE

Improve value proposition; making attractive to all HIMs

LEAD

Improve governance & administration; develop volunteer cadre

ADVOCATE

Increase visibility & influence of NYHIMA at all levels

BENCHMARKS

Study of membership levels; participation across all platforms

Best practices assessment; budget analysis & trends; analysis of association participation

Surveys of profession, membership and outreach effectiveness; impact on membership

STRATEGIES

Target all patent practitioners; refine/improve benefits/services

Governance paradigm; new resources for vol./committees

Marketing push; member action; create strategic alliances

ACTION ITEMS

- Identify needs of all members
- Effective programming & services
- Recruitment & Retention Plan
- Anticipate trends

- Continue governance review
- Volunteer Cadre
- Committees
- Leadership training
- Expand resourcing

- Raise profile
- Social Media
- Expand outreach
- Direct marketing
- Promote govt. affairs efforts
- Member involvement in promotions



Strategic Plan 2017 – 2019 WORK PLAN

**Revised
1/19/17**

Approved by Board of Directors

GOAL #1 ENGAGE & EDUCATE

Notes: *Bridge Action* denotes items that are currently underway or should be initiated while this Strategic Plan is being finalized. The implementation window for the Bridge Actions is the next 90-120 days.

COLOR CODE SCHEME

2017 Major Goals→		2018 Major Goals→		Ongoing Goals/2017-19→	
-------------------	--	-------------------	--	------------------------	--

Strategy	Action Item(s)	Responsible Position(s)	Deadline	Notes/Status
Strengthen value proposition of NYHIMA membership through effective programs, services and initiatives to all patent practitioners.	<ol style="list-style-type: none"> 1. Conduct full review of member benefits and the packaging of the association’s value proposition. 2. Continue surveying membership to identify needs, trends, and effectiveness of current offerings (using target surveys). 3. Increase awareness and participation in NYHIMA programming. 	Membership Chair Board of Directors Office Operations Manager	By June 2017	<ol style="list-style-type: none"> 2. Bridge Action Survey on Forum, access, etc.
Develop formal membership recruitment and retention plan—with outreach to NYS HIMs to grow membership.	<ol style="list-style-type: none"> 1. Craft targeted messages for all prospective member types/groups. 2. Obtain contact lists from all appropriate sources 3. Develop outreach campaign across all platforms—including mailings, social media and “grassroots”/PPI 	Communications & Marketing Directors Office Operations Manager Board of Directors	Begin in July 2017—and complete in 2018	

<p>Provide state-of-the-art professional development for education, competence and career success.</p>	<ol style="list-style-type: none"> 1. Work to develop a standard timeframe to develop, announce and promote all training opportunities and events. 2. Continue to expand Annual Conference footprint and offerings. 3. Study and develop greater collaborative efforts with the Locals; offering programming and networking opportunities for all members. 	<p>Education Director Office Operations Manager</p> <p>Annual Conference Chair & Committee</p> <p>Membership Committee Communications Director Office Operations Manager Local Leaders (as applicable)</p>	<p>Ongoing</p>	<p>2. Bridge Action</p>
<p>Increase member equity by developing and promoting improved access to NYHIMA services and benefits.</p>	<ol style="list-style-type: none"> 1. Address use of technology as needed to ease access and expand use of NYHIMA’s benefits. 2. Conduct website content review; developing it as the “clearinghouse” or portal for all NYHIMA services. 	<p>Membership Chair Office Operations Manager</p>	<p>Ongoing</p>	<p>1. Bridge Action</p>
<p>Strategically promote NYS HIMs—both as professionals in the field and as members of NYHIMA.</p>	<ol style="list-style-type: none"> 1. Create recognition system for member successes. 2. Highlight such successes across the full spectrum of NYHIMA communications. 	<p>Communications Director Social Media Office Operations Manager</p>	<p>Ongoing</p>	
<p>Other potential strategies for 2017 – 2019?</p>				

GOAL #2	LEAD
----------------	-------------

Strategy	Action Item(s)	Responsible Position(s)	Timeline	Notes/Status
Strengthen governance and administration paradigm.	<ol style="list-style-type: none"> 1. Continue to review operations at all levels and assess for best practice implementation. 2. Implement a new structure for annual roll-out of outreach, programming and all services. 3. Ensure leadership oversight is in synch with administrative structure, i.e. job descriptions, etc. 	Board of Directors Officers Office Operations Manager	2017	
Conduct Local Assessment to ascertain current conditions and needs of the Locals.	<ol style="list-style-type: none"> 1. CHMS will perform both written and verbal assessment of all Locals to ensure compliance with NYS Nonprofit Revitalization Act and determine needs of the Locals 2. Report with recommendations to be presented to Board and Local leaders. 	Board of Directors Local Leaders Office Operations Manager CHMS Management Team	2017	1. Bridge Action
Establish new leadership development program.	<ol style="list-style-type: none"> 1. Create new Leadership Development Committee; expanding efforts to identify and recruit potential new volunteers for leadership—paying attention to greater diversity within the association. 2. Create new on-boarding schedule and orientation program new officers and directors. 3. Continue to develop resources and tools for leaders—at both statewide and local level. 	President Board of Directors Office Operations Manager CHMS Management Team	Begin in late 2017—and complete in 2018	
Create and implement new Committee Operations structure.	<ol style="list-style-type: none"> 1. Review all NYHIMA Committees; ensure structure represents the association’s needs. 2. Develop goals and action items for Committees. 3. Conduct Committee Chair orientation and training. 	Board of Directors Office Operations Manager	2018	1. Bridge Action

Create and implement Volunteer Recruitment Program.	<ol style="list-style-type: none"> 1. Initiate a kick-off campaign—promoting opportunities via project basis with overview of needs, etc. 2. Promote need and opportunities across NYHIMA communication platform. 	<p>Communications Director Social Media/Communications Office Operations Manager</p>	2018	
Develop templates for governance and administrative needs and consistency.	<ol style="list-style-type: none"> 1. Continue to identify vital planning documents/resources that need to be updated, replaced or created to fit the paradigm. 	<p>Executive Team Office Operations Manager</p>	Ongoing	
Continue to develop, improve and leverage all aspects of the NYHIMA's "Toolkit" in identifying and responding to trends and the needs of a changing, diverse membership.	<ol style="list-style-type: none"> 1. Expand breadth of communications/outreach to highlight news, events and opportunities. 2. Provide at least 1 media/social media training to NYHIMA leaders and members. 	<p>Communications Director Social Media Office Operations Manager Local Leaders</p>	Ongoing	
Tout the achievements of NYHIMA, its leaders and members!	<ol style="list-style-type: none"> 1. Create a "pipeline" for submitting news/updates from across the country and use this information across the full spectrum of the association. 	<p>Office Operations Manager</p>	Ongoing	
Continue long-range planning of Annual Conference and major events.	<ol style="list-style-type: none"> 1. With conference dates and venues secured for 2017 and 2018—continue planning out the additional years to maintain 3 year spread. 	<p>Annual Conference Committee President Office Operations Manager</p>	Ongoing	
Continue wise financial management to garner the biggest benefit for NYHIMA.	<ol style="list-style-type: none"> 1. Provide regular financial updates and reporting to leadership. 2. Work with CHMS Finance Department for fuller budget and financial trends analysis. 3. Identify long-range financial needs in order to prepare beyond annual cycle. 	<p>Treasurer Office Operations Manager CHMS Finance Team</p>	Ongoing	
<i>Other potential strategies for 2017 – 2019?</i>				

GOAL #3**ADVOCATE**

Strategy	Action Item(s)	Responsible Position(s)	Deadline	Notes/Status
Develop and implement a NYHIMA Lobby Day in Albany	<ol style="list-style-type: none"> 1. Choose a date for maximum participation by members. 2. Develop advocacy materials that will be left for elected officials and staff. 	Legislative Director Board of Directors Office Operations Manager	2017; build upon event success in 2018	
Develop and implement a full outreach/communications plan to increase visibility and influence of NYHIMA.	<ol style="list-style-type: none"> 1. Place NYHIMA on wide variety of social media outlets and coordinate the release of information. 2. Conduct website content review; developing it as the “clearinghouse” or portal for all NYHIMA services. 3. Develop annual editorial/promotional schedule. 4. Develop, brand, and implement targeted outreach tools: “Did You Know?” “Faces of NYHIMA”; testimonials “From the Trenches” + Hard Collaterals (mailers, brochures, etc.) 	Communications Director Social Media Legislative Director Office Operations Manager	Ongoing	<p>1. Bridge Action</p> <p>3. Bridge Action</p>
Increase the visibility and influence of NYHIMA leadership and members within the HIM and the general records community to promote NYHIMA.	<ol style="list-style-type: none"> 1. Identify and support/attend 2-3 HIM events 2. Communicate updates to members and how they can be involved via NYHIMA communications network. 3. Develop and implement “grassroots” member engagement plan; asking for their assistance in “spreading the word.” 	Board of Directors Government Affairs Committee Communications Director Social Media/Communications Office Operations Manager	Ongoing	
Monitor and influence legislation; educate members about legal and regulatory issues.	<ol style="list-style-type: none"> 1. Review bills, court actions, AHIMA reports and determine which NYHIMA will support or oppose. 2. Provide routine reporting methodology for all government affairs issues and updates. 	Board of Directors Government Affairs Committee Office Operations Manager	Ongoing	

Promote NYHIMA’s role in protecting the HIM system to policy makers and decision makers; position NYHIMA as the “go-to” source.	1. Develop and distribute updates to policy makers and decision makers across NYHIMA’s communications platform—especially social media.	Government Affairs Committee Office Operations Manager	Ongoing	
<i>Other potential strategies for 2017 – 2019?</i>				