

## APS Strategic Plan

### Background

In February 2017, members of APS Council, the Section Advisory Committee, the Trainee Advisory Committee, and Senior Staff convened in Houston for a 3-day strategic planning session. The session was facilitated by Minding Your Business, a strategic agency based in Chicago, IL, that has supported APS on a number of strategic initiatives in 2016 and 2017.

This document outlines the strategic priorities identified and discussed during the strategic planning session and is organized into five strategic pillars to guide the Society over the next 3-4 years:

- 1.0 - Refreshing the strategic focus of the Society
- 2.0 - Modernizing the membership model
- 3.0 - Prioritizing and evaluating Society offerings
- 4.0 - Extending the influence of the Society through journals and conferences
- 5.0 - Enhancing governance and operational performance

### 1.0 - Refreshing the Strategic Focus of the Society

As APS has done in the past, we took the opportunity during this strategic planning cycle to take stock of some foundational aspects of our Society, notably our vision, mission, and core audiences. We identified the following objectives related to these important concepts.

#### 1.1 - Update APS Vision and Mission

Leading up to the strategic planning sessions, a small task force was created to review and refresh some foundational concepts for the Society, including mission and vision to better align with why APS exists and determine how we can best support our members and the discipline of physiology into the future. The approved versions for each are below.

**Mission.** To advance scientific discovery, understand life, and improve health.

**Vision.** A global multidisciplinary community of scientists solving the major problems affecting life and health.

#### 1.2 - Establish Unique Value Proposition and Tagline

In addition to the mission and vision, we also contemplated two strategic marketing and communications concepts. These included a unique value proposition (UVP) and a tagline. The UVP states what is uniquely valuable about the Society and is a foundational concept that distills what is special about the Society and supports message development.

The recommended and approved refreshed version of the UVP is listed below.

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### A Matter of Opinion

## A Time of Transitions

Over the past year, I have written about the many transitions that will impact the Society. The most apparent is the finalization of the Society's latest Strategic Plan, which is published in this issue of *The Physiologist*. The effort by Council, the Section Advisory Committee, the Trainee Advisory Committee, and APS Directors was designed to refocus the Society's energies, identify new opportunities, and reassess our existing programs. Overall, it is anticipated that the Society's efforts over the past year will strengthen the Society and make it more inclusive. It is anticipated that each of us will be able to benefit from our strategic planning efforts.

One of the Strategic Plan's priorities is to create a more inclusive membership model that facilitates the inclusion of a broader physiological community. In addition, we hope to enhance the

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### APS Strategic Plan

**Unique Value Proposition.** APS is a community that champions the discipline of physiology.

The tagline is part of a brand's identity and is typically paired with a logo. Taglines exist to create a lasting impression of value as audiences are exposed to brand messaging. The recommended and approved refreshed version of the tagline is listed below.

**Tagline.** Empowering discovery to improve health.

#### 1.3 - Establish Audience Priorities

As a large international Society and a champion for the discipline of physiology, APS has a broad reach. At the same time, although financially healthy, APS is a Society with finite resources, and, as such, it is prudent to discuss which audiences within the APS community should be priorities for us. Based on our work in the strategic planning sessions, we have defined our primary audiences as follows:

- Researchers
- Educators
- Trainees (graduate students and postdoctoral fellows)

Our other audiences are:

- Undergraduate students
- The broader scientific community
- Funding agencies
- Legislators
- K-12 educators and students
- University leadership
- Health industry
- Consumer media/general public

As part of this process, APS will also address its technology infrastructure – in particular its databases for contacts and relationship management, as well as its web presence – to leverage these technologies in service of its priority audiences.

#### 2.0 - Modernizing the Membership Model

Having been founded over a century ago and grown to represent over 10,000 professionals, membership is at the heart of our Society. APS strives to be a member-driven organization, and during our strategic planning session, we identified the following membership-focused initiatives to address through this strategic plan.

##### 2.1 - Establish a Simplified, Inclusive Membership Model

During our planning discussions, we identified considerable interest in broadening our membership

base. At the same time, there is a need to simplify some of the administrative complexities surrounding the existing membership structure. In brief, membership should be open to everyone. To do this, it was agreed that APS will 1) redefine its membership structure so that proof of published research is no longer a requirement for membership; 2) remove the requirement that membership applications be reviewed by the executive office; 3) put mechanisms in place so applicants can sign up and pay dues at once; 4) modify the structure so that the path of migration from student membership to regular membership is clear and facilitated; and 5) revise Society bylaws as necessary to reflect these desired changes.

##### 2.2 - Update Technology and Processes to Streamline Member Services and Retention

To improve how we deliver services to our membership base, APS will evaluate and enhance the technology and processes used to deliver these services. Examples of these initiatives include building out more flexible payment options via the APS website, enhancing the APS Connect experience, and creating repeatable processes to reach out to lost and lapsed members. Additionally, we will develop processes that more directly personalize the connection between the member and the Society.

##### 2.3 - Develop Additional Engagement Opportunities for International Members

As a Society with headquarters in the U.S., but with many members across the globe, we see a need to be more proactive about developing additional opportunities to engage our international colleagues. APS will develop the tools and processes to engage these audiences virtually so that the geographical limitation can be overcome and engagement can be improved. We will also review current governance requirements that at present call for a member's physical presence at committee meetings to participate in leadership opportunities.

##### 2.4 - Establish and Review Membership Metrics

With the intended improvements to the structure and administration of APS membership activities, the Society will also develop a group of key performance indicators (KPIs) to measure and track over time, thereby developing the discipline to track key drivers of performance in an ongoing fashion.

#### 3.0 - Prioritizing and Evaluating Society Offerings

Over the years, the Society has developed a broad range of member benefits and programmatic activities. Many of these initiatives were originated via committees,

approved by Council, and then executed by volunteers and staff. Although we are proud of the many successful initiatives that we have created over the years, we found it important to develop the needed framework for determining the value and importance of these initiatives, to assess the results they produce, and to evaluate the processes by which they are created. During our strategic planning session, we identified the following needs to address as part of this strategic plan.

**3.1 - Temporarily Suspend the Creation of New Initiatives**

Based on our discussions in the session, we concluded that we should temporarily suspend the creation of new initiatives so that we can invest time in developing a greater understanding of our programmatic priorities and how they are evaluated and aligned with the Society’s strategic priorities.

**3.2 - Establish Programmatic Priorities and Assess Resource Allocations**

During our strategic planning session, we examined the broad range of membership benefits and programmatic activities. However, it was a challenge to prioritize these initiatives without additional data needed to understand the importance and satisfaction to members and the APS community. Given this, we decided to conduct member research to help us make those determinations. As a result, we developed and deployed a survey of members and nonmembers to coincide with the post-meeting survey of EB.

Informed by this research, APS assessed the volunteer, staff, and financial resources that are applied to initiatives, helping leadership make decisions so that resources are aligned with strategic priorities.

APS Leadership then engaged in a systematic assessment of all membership benefits and programmatic activities to identify those that:

- 1) Are relevant and valuable to its members and potential members
- 2) Are of value, but are underperforming or have more potential to increase participation
- 3) Hold little value or serve a small segment of the overall membership and should be considered for elimination in an effort to free up

resources to reallocate to new initiatives or bolster those that are valued, but underperforming.

Factors considered included 1) target audiences, 2) importance and satisfaction, 3) awareness and usage, and 4) resources required to maintain those benefits and activities (volunteer time, staff time, and financial investment). Current programs are being reviewed, and APS leadership task forces are being assembled to address better program optimization.

Following is a list of programmatic priorities from that assessment. Each is color-coded to identify which membership benefits and programmatic activities are performing well (green), which are underperforming or have more potential to increase participation and should be areas of focus (yellow), or those that should be considered for elimination or outsourced (red).

**3.3 - Develop and/or Apply Evaluative Measures to APS Initiatives**

Although it is outlined in our governance documents, APS does not consistently and uniformly develop and apply evaluative measures to its programs. Without specific and measurable goals, it becomes challenging to assess the success or inadequacies of our programs. Therefore, as part of this strategic plan, we will expect that all APS initiatives will be reviewed, and evaluative metrics will be developed and monitored in an ongoing fashion. This

Ranking	APS Products and Services
1	Reading APS Journals
2	Minority Scientist Programs
3	Publishing research in APS Journals
4	Science Policy Activities
5	Grad student / post-doc abstract-based awards
6	Peer-reviewing for the APS Journals
7	Undergraduate Programs
8	Experimental Biology Meeting
9	Early career awards
10	Life Science Teaching Resources Community
11	APS Conferences
12	APS Fellows Program
13	Graduate/Professional Education Programs
14	Physiology Understanding Week
15	K-12 Education Programs
16	APS section-based communities and activities
17	Sharing physiology news and information with non-scientific communities
18	The APS Living History of Physiology Project
19	Job postings on APS Website
20	Career/Lifetime Achievement awards
21	APS Chapters
22	Member Communications – Email Updates
23	Member Communications – APS Connect Online Community
24	Member Communications – Social Media
25	APS Store

will also provide metrics by which we will measure the success of each initiative and identify those that support the APS value proposition to members, those that are in need of revitalization to ensure continued value, and those that should be terminated.

### **3.4 - Roll Out a New Era of Programmatic Initiation and Evaluation**

With evaluation components in place for existing programs, we will usher in a new method of identifying and approving new initiatives for the Society. Potential methodologies include Lean-Startup or cost-benefit analyses that identify areas of unmet and under-met needs and build a case for whom programming should be developed and how its impact will be measured.

## **4.0 - Extending the Influence of the Society Through Journals and Conferences**

In the pursuit of our mission to advance scientific discovery, understand life, and improve health, one of our strongest opportunities is to leverage the entire APS community and the forums we have developed for the dissemination of knowledge. The APS journal program is a vital asset in achieving our objectives, as is our meeting/conference program.

### **4.1 - Grow Internal Capacity in Publications Marketing and Promotions**

APS journals are vital assets to the organization, financially and in terms of exposure for the Society and its members. The editors, authors, peer reviewers, and readership represent a core group within the physiology community; however, many are not members of APS. We believe there are opportunities to develop strategies that leverage these assets and participants to support the Society and its mission. The first step in this process is to grow our internal capacity in the discipline of publications marketing and promotions by adding staff and/or engaging consultants with expertise in this area. This increased capacity will allow us to identify ways to leverage our journals and publications community for the benefit of the discipline and our Society. For example, we might develop programs that connect journal editors and section chairs with speaking opportunities at non-APS conferences or engage them in recruiting prospective and/or lapsed members. As part of this capacity development, we expect that updated technology will likely be needed to execute new publication-centric initiatives.

### **4.2 - Conduct Post-Meeting Research on EB**

In conjunction with the research effort outlined in *section 3.2*, we took the opportunity to conduct research to help us better understand needs and satisfaction related to EB. The findings will be applied as part of the

initiative outlined below in *section 4.3*. The results from the survey analysis have provided us with a baseline of key performance indicators from which we will be able to measure success into the future. Post-meeting research should take place annually to benchmark the performance of EB.

Research findings indicated the following areas were in need of attention:

- 1) Quality of sessions
- 2) Content in areas of specialty
- 3) Networking opportunities for research collaboration
- 4) Need for more new information to be shared
- 5) Access to thought leaders
- 6) More opportunities to give oral presentations
- 7) Improvement of conference navigation

These findings have been shared with volunteers and staff involved in the development of EB. Initiatives to improve these areas are already taking place.

### **4.3 - Develop a Conference Program Strategy Covering Annual Meeting and Specialty Conferences**

Conferences and meetings represent an important opportunity to bring together members and nonmembers to advance the discipline of physiology. Currently, APS holds/organizes an annual meeting at EB and a few smaller, topic-focused conferences throughout the year. However, EB is undergoing significant changes in its composition, and, although APS is committed to the EB format, meeting venues have only been determined through 2020. It is important for us to develop a long-term strategy that addresses our members' meeting needs. In conjunction with this goal, it also is prudent to bring the smaller APS Conferences into the context of a larger Meetings and Events strategy.

Additionally, the strategic planning session also featured a forward-looking "blue sky" discussion that solicited ideas on how APS could make an impact with its members and the broader scientific community.

## **5.0 - Enhancing Governance and Operational Performance**

As part of our commitment to being responsible leaders of the Society, we invested a portion of our strategic planning session in discussing Society governance and strategic operations. Those discussions produced the following strategic priorities.

### **5.1 - Install Membership Committee Representation on Council**

APS Governance does not have the Membership Committee represented on Council. However, given the strategic priorities identified in *section 2.0* of this plan, we

see a critical need for that voice to be a part of Council conversations.

**5.2 - Develop Processes to Manage Our Progress in Executing Our Strategic Plan**

During our sessions, it became clear to us that there are opportunities to define processes that help us lead our Society in ways that bring greater alignment across Council, committees, and staff. Chief among these needs is the creation of a performance scorecard for the Society that allows us to keep a pulse on key areas of performance. Examples include financial reporting, membership recruitment and retention, and key program evaluations. This dashboard will serve as a discussion platform for how the Society can leverage its resources to achieve its desired goals. This dashboard will also provide a platform for how APS staff manages its activities in conjunction with this new strategic plan and its measurements.

**5.3 - Move Forward on APS Website Redevelopment**

It was discussed in the sessions several times that the Society needs to upgrade its web presence. As a central

source for information about the Society, as well as a hub for its community, it was agreed that a new website is a priority.

**5.4 - Enhancing the Society’s Section, Group, and Chapter Structure**

APS Sections play a vital role in the Society’s governance and programming activities, and APS Chapters play a key role in engaging our community at local, state, and regional levels. During the planning session, discussions arose about the potential benefits of reviewing the current structure of sections and groups to ensure they are providing maximum benefit to members.

**Prioritization of Initiatives**

It is anticipated that this strategic plan will serve APS for the next 3-5 years. Therefore, we have prioritized these initiatives into a format that slots the initiatives into one of three time frames: Now (within a year); Soon (1-2 years); and Future (2-4 years). ●

	Now (within a year)	Soon (1-2 years)	Future (2-4 years)
1.1 – Update APS vision and mission	X		
1.2 – Establish unique value proposition and tagline	X		
1.3 – Establish audience priorities	X		
2.1 – Establish a simplified, inclusive membership model		X	
2.2 – Update technology and processes to streamline member services and retention		X	
2.3 – Develop additional engagement opportunities for international members		X	
2.4 – Establish and review membership metrics	X		
3.1 – Temporarily suspend the creation of new initiatives	X		
3.2 – Establish programmatic priorities and assess resource allocations	X	X	
3.3 – Develop and/or apply evaluative measures to APS initiatives	X	X	X
3.4 – Roll out new era of programmatic initiation and evaluation	X	X	
4.1 – Grow internal capacity in publications marketing and promotions		X	
4.2 – Conduct post-meeting research on EB	X		
4.3 – Develop a conference program strategy covering annual meeting and specialty conferences	X	X	X
5.1 – Install membership committee representation on Council		X	
5.2 – Develop processes to manage our progress in executing our strategic plan	X	X	
5.3 – Move forward on APS website redevelopment	X	X	