



2013 Strategic Plan

**Prepared by Catalysis LLC
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Our Vision

Dedicated to an ongoing and evolving cooperative relationship of regulation between the massage industry, licensees, and the public.

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Executive Summary

The Oregon Board of Massage Therapists (OBMT) is undergoing a strategic planning process at a significant moment in Oregon in which critical shifts in healthcare regulation and management are coupled with an increased focus on healthcare benefits of massage. Creating an opportunity to engage in strategic thinking is critical to the development of a strategic framework and action plan that can address this changing environment. This strategic plan will allow OBMT to achieve its vision of “developing an ongoing and evolving cooperative relationship of regulation between the massage industry, licensees, and the public.”

In the spring of 2013, OBMT launched a strategic planning process to develop a set of strategic initiatives to actualize the vision, mission and value statements. The Board regulates the practice of massage through licensing, establishing continuing education requirements, promoting education, administering tests to establish minimum competency to practice and enforcing professional behavior and standards.

The process involved two days of open planning sessions with Board members and members of the public. Catalysis LLC, a Portland-based strategic planning firm, facilitated the planning process. To form a solid foundation for the plan, the group went through a process of mapping the internal and external landscape of OBMT. This included identifying the current OBMT landscape, including strengths, weakness, opportunities and threats (SWOT). The SWOT analysis included a prioritization with the goal of identifying the most pressing concerns and opportunities for the future.

The second day of planning was launched with a discussion of key critical success factors. Critical success factors are the conditions or factors that must be present in order for an organization to achieve its mission, or in other words, what an organization **MUST** accomplish in order to be successful. These key factors formed the foundation for a set of comprehensive strategic initiatives that outline the specific work needed to achieve the OBMT vision and mission.

A key outcome of the planning process was a reiteration that the OBMT as an entity has made great strides in the last few years in strengthening its relationship with the legislature and licensees. Strong discipline and understanding of its role and responsibilities as a regulatory board has characterized these improvements. Board members reaffirmed this focus and the following plan outlines a strategy that follows this trajectory.

The following plan is a result of the process outlined above. A set of four key strategic initiatives will serve as a guiding framework for the work of OBMT over the next five years. The detailed strategies and tactics provide next steps and measurable outcomes and are meant to serve as a “living plan” that will continue to evolve as the Board ensures that its service is informed by the needs of its various constituents: the public, massage therapists and the State of Oregon.

Planning Foundation

Our Vision

Dedicated to an ongoing and evolving cooperative relationship of regulation between the massage industry, licensees, and the public.

Our Mission

The Oregon Board of Massage Therapists regulates and monitors the practice of massage therapy in Oregon. Its role is to balance public safety and the needs of Licensed Massage Therapists by developing, implementing, and maintaining the standards of professional conduct and practice.

Our Values

Accessibility

Provide up-to-date information on the Internet for both the public and the licensees. Strive to be an approachable resource to the massage industry, licensees, and the public.

Accountability

Accountable for safety, health and welfare of the public, the integrity of the profession and massage therapists, as well as oversight and responsibility in reporting to the Governor and the legislature.

Collaboration

Willingness to approach others with openness, to be open to the ideas of others and to be willing to shift off-point. Value the relationships amongst the legislators, the licensees and ourselves. Willing to craft compromise and ask questions, identify outcomes that are desired but be open to influence.

Communication

Endeavor to listen, reflect and clearly state the role and functions of the Board in its partnership with the licensed massage therapists and the public we serve.

Integrity

The OBMT prides itself on conducting its business practices with adherence to soundness of character and ethical principles.

Transparency

Open and honest regulation of massage therapy in the State of Oregon.

Strengths, Weaknesses, Opportunities and Threats (SWOT)

The planning participants launched the foundational planning with a thorough SWOT Analysis. The first part of this process involved the identification of the current strengths and weaknesses of the organization. Strengths and weaknesses are typically internally focused and highlight the inherent qualities of an organization. After the initial brainstorming, the group identified the top five strengths and weaknesses attributed to OBMT.

Ranking	STRENGTHS
1	Recognition of role as a semi-independent regulatory board
2	Improved relationship with Legislature & Legislators
3	Policies & Procedures in place
4	Engaged Board at full membership
5	Balance between Consideration & Compliance
	Good introspection
	Executive staff
	Improved communication with professional associations

Ranking	WEAKNESSES
1	Inconsistency
2	Reputation
3	Slow pace of progress
4	Sometimes out of touch with licensees
5	Lack of institutional memory
	Gaps in Board appointees

Following an analysis of internal strengths and weaknesses, the group shifted its focus to external opportunities and threats. These are external factors that may either offer new possibilities, or present threats to the success of OBMT. After the initial brainstorm, the group again prioritized the top five factors in each that are the most critical to address.

Ranking	OPPORTUNITIES
1	Defining scope of practice
2	Changing landscape of healthcare
3	Current legislation to study Oregon Boards and Commissions – possible Board & Commission consolidation
4	FSMTB - data sharing & commonality of data
5	Insurance coverage changes
6	Greater awareness and acceptance of massage as a therapeutic practice
	Expressed need by licensees for identified modalities and specialties
	Massage therapy research findings
	Opportunity to distinguish between massage as a healthcare therapy and a spa treatment
	Changing acceptance of technology tools
	Scope for massage therapy in new Oregon Health Plan
	Corporate Franchises – opportunity for greater accountability, relationships and support for regulation
	Increased need for massage therapy (lifestyle, technology impacts)

Ranking	THREATS (CHALLENGES)
1	Overlapping scope of practice
2	Legislator attitude toward regulating massage therapy
3	Economy
4	Current legislation to study Oregon Boards and Commissions – possible Board & Commission consolidation
5	Pressure of changing academic delivery
6	Lack of continuity in regulation between states
	Insurance coverage changes
	Regulation seen as enemy to economy
	Pressure to have exams and materials in other languages - expense
	Cuts in funding available for research
	Changing business model from sole proprietorship to corporate franchise (i.e. facilities license)
	Geographically Dispersed in Oregon (in regards to exams)

Critical Success Factors

A crucial component of the planning process is the identification of the most critical factors for success. These are the conditions, which if not met, will make it almost impossible to achieve the desired vision. The group identified a list below of major factors that must be achieved for the Board to be successful, and then prioritized the top five factors.

Ranking	CRITICAL SUCCESS FACTORS
1	Effective and welcome communication strategy (social media, webpage)
2	Pathway to licensure/renewal is reasonable, understood, efficient, affordable
3	Established criteria and strategy for accepting CEUs and compliance procedure
4	Profession is esteemed through effective regulation; Massage is an accepted and credible healthcare therapy
5	Strong relationship with executive and legislature
	Stay (continue) on course
	Clear definition of scope of practice
	Strong relationship with massage trade organizations
	High standards for licensure
	Schools turn out students prepared for licensure
	Strong understanding/discipline of our role as regulatory board
	Standards in line with other regulatory boards

Strategic Framework

This strategic plan is focused on addressing the critical success factors in order to achieve the overall vision. A set of strategic initiatives were identified and prioritized around each of these critical success factors. For each strategic initiative, a set of prioritized strategies were identified, specifically designed to make use of strengths and opportunities to mitigate the weaknesses and threats identified in the earlier SWOT analysis.

Planning participants provided feedback and prioritization of the strategies listed. More specific operational tactics, with measurable outcomes, will be developed for each strategy listed. In the following pages, each strategic initiative is identified, followed by a set of recommended strategies.

Major Strategic Initiatives

- 1) Support high standards and an efficient, reasonable, affordable, and understood pathway to licensure.
- 2) Develop an effective role and relationship with the State of Oregon.
- 3) Establish well-defined renewal and continuing education strategy.
- 4) Create an effective and welcome communications strategy for all constituents.

Strategic Initiative #1

Support high standards and an efficient, reasonable, affordable, and understood pathway to licensure.

The Board will continue to hold high standards in licensure while looking for ways to simplify the pathway to licensure, promote efficiency, and identify opportunities to decrease licensing costs. A number of strategies were created that address these opportunities, aligning with the Board's Critical Success Factors. For each strategy, a set of detailed tactics and measurable outcomes has been developed. This set of tactics is described in the section "Detailed Strategies & Tactics" following the description of the strategic initiatives.

PRIORITIZED STRATEGIES	
1.	Develop clear and efficient sequence of steps to licensing.
2.	Address concerns of costs and distance on testing.
3.	Evaluate and disseminate new online scheduling.
4.	Review candidate handbook to identify info that can be simplified or strengthened.
5.	Work with schools to develop effective methods for communicating process of licensing candidates.

Strategic Initiative #2

Develop an effective role and relationship with the State of Oregon.

Of utmost importance is the relationship between the Board and its stakeholders. This includes executive and legislative branches, government representatives, trade associations and community members. These relationships are vital to the future success of the Board and directly align with the vision of OBMT to nurture, “ongoing and evolving cooperative relationship of regulation between the massage industry, licensees, and the public.” The following strategies outline ways to continue to improve the service of OBMT to the State of Oregon.

PRIORITIZED STRATEGIES
1. Define scope of practice.
2. Strengthen ongoing relationship with trade associations.
3. Educate board on executive structure and legislative process.
4. Invite government representatives to OBMT meetings.
5. Identify LMT “ambassadors” to various government levels and community groups.
6. Utilize presence of the board in different areas of the state.

Strategic Initiative #3

Establish well-defined renewal and continuing education strategy.

Increasing clarity and understanding to licensing processes around renewal and continuing education will provide stronger ties of communication with licensees and promote high standards for professionals in the field. Improvements will balance needs for a reasonable and worthwhile process with the importance of high quality educational standards.

PRIORITIZED STRATEGIES
1. Address need for ethics CEUs (determine hours, board approved courses).
2. Clarify and simplify renewal late fee policy.
3. Evaluate ratio of contact and non-contact hours required.
4. Develop compliance procedure when hours not met.
5. Establish criteria and acceptance strategy for CEUs.

Strategic Initiative #4

Create an effective and welcome communications strategy for all constituents.

In order to be an effective organization, the Board needs to have a communication strategy that is welcoming as well as effective. This may include generating new modes of communication, such as social media and increased face-to-face time with students, as well as identifying modes that are not effective. This initiative lays out a series of steps to improve communication with committees, schools, licensees, and community members. In the following section detailed tactics and measurable outcomes are described. The overall goal is to develop communication strategies that are clear, concise and welcoming.

PRIORITIZED STRATEGIES
1. Improvement in internal communication and clearer directives to committees.
2. Updated compliance information readily available.
3. Evaluate possible use of social media to communicate with constituents.
4. Improve communication with schools.
5. Improve information sharing with licensees.
6. Develop written information for law enforcement and county officials/fairs.
7. Identify ways to recognize/acknowledge licensees.
8. Improve presentation of compliance info (trends).

Detailed Strategies & Tactics

The following pages present an outline of the detailed strategies, tactics and measurable outcomes for each of the four strategic initiatives. As the plan unfolds and work progresses, it is expected that the tactics used may be modified. Whenever possible the tactics are prioritized and arranged in a progressive order so that each step can be informed by the prior work. Dates for completion that align with the work of the Executive Director and the Board will be inserted as available.

Strategic Initiative #1		Owner	Measurable Outcomes
Support high standards and an efficient, reasonable, affordable, and understood pathway to licensure.			
1	Develop clear and efficient sequence of steps to licensing for individuals and facilities.	Executive Director	
	a. Outline sequence of steps required for licensing and renewals for individuals and facilities.		Clear understanding of the steps required.
	b. Develop brief online survey and gather input from schools, candidates, facilities, recent licensees and failed applicants for feedback on licensing process.		Findings reported to Board by (date)
	c. Identify barriers that can be removed by consolidating or simplifying steps.		Barriers identified and recommendations for reducing barriers developed and presented to Board by (date).
	d. Make changes to candidate handbook and website as needed to clarify and simplify steps.		Changes made and disseminated.
	e. Determine appropriate dissemination materials so that steps are clear to individuals and facilities.		Changes made and disseminated.
2	Address concerns of costs and distance on testing.	Executive Director Board Chair	
	a. Review Oregon Practical Exam.	Board Task Force	
	b. Determine feasibility for regional testing and testing at schools.		New testing site(s) developed.
	c. Develop benchmark comparisons of testing costs in comparable states.		
	d. Develop proposal to present to Board for review and approval.		Costs reduced for rural applicants.
3	Evaluate and disseminate new online scheduling.	Executive Director	
	a. Determine effectiveness of online scheduling.		Usage of online scheduling increased by ___% by (date).
	b. Develop dissemination plan to promote online scheduling.		
4	Review candidate handbook to identify info that can be simplified or strengthened.	Executive Director	
	a. Simplify language in handbook.		COMPLETED
	b. Add new model curriculum effective July 1, 2013 added to handbook		COMPLETED
	c. Make any additional changes or clarifications as needed from investigation of simplifying steps (strategy #1)		Updates made to handbook as needed.
5	Work with schools to develop effective methods for communicating process of licensing candidates.	Executive Director	
	a. Hold open house for potential candidates at schools at appropriate times during the school terms.		Open house presenters and dates identified.
	b. Identify resources for videographer and develop video that can be distributed to schools.		
	c. Develop other materials as required for communicating with schools regarding streamlined licensing process.		

Strategic Initiative #2		Owner	Measurable Outcomes
Develop an effective role and relationship with the State of Oregon.			
1	Define scope of practice.	Board Committee	
	a. Establish task force on defining scope of practice.		
	b. Identify clear meeting schedule and timeline for work.		
	c. Determine requirements needed for scope definitions for Medicaid, exemptions, etc.		
	d. Determine implications for scope of practice definitions created by the Oregon Health Authority.		
	e. Develop draft plan for dissemination of scope of practice definition (legislators, trade associations, Medicaid, etc.)		Proposed scope of practice definition presented to Board by (date)
	f. Develop proposal and present to full Board.		Scope of practice and dissemination plan approved by (date)
2	Strengthen ongoing relationship with trade associations.	Board	
	a. Board members attend ABMP, AMTA, etc.		Meetings attended by OBMT Board Members
	b. Invite trade association leadership to OBMT meetings.		Trade association reps in attendance at OBMT meetings.
3	Educate board on executive structure and legislative process.	Executive Director	
	a. Hold annual training/updates for Board members on executive structure and legislative process.		Annual training held.
	b. Train Board members on how to communicate with legislators.		Information provided to Board members.
	c. Identify and disseminate professional development opportunities for Board members.		Opportunities disseminated as available.
4	Invite government representatives to OBMT meetings.	Executive Director	
	a. Identify recipients and extend invitations.		Government representatives in attendance at meeting(s).
5	Identify LMT "ambassadors."	Board	
	a. Solicit Board member suggestions for LMT "ambassadors"		
	b. Populate ambassador database.		
	c. Develop strategies for using ambassadors effectively (legislative meetings, school open houses, newsletter stories, etc.).		LMT ambassadors identified and used as needed.
6	Utilize presence of the board in different areas of the state.	Board	
	a. Maintain strategy of making regular courtesy "calls" and being involved in district.		
	b. Develop timeline and strategy for calls/visits.		
	c. Assist Board members as needed with contact information and meeting date/opportunities.		Board members provide regular updates on community involvement.

Strategic Initiative #3		Owner	Measurable Outcomes
Establish well-defined renewal and continuing education strategy.			
1	Address need for ethics CEUs (determine hours, board approved courses).	Board Committee	
	a. Identify task force to determine appropriate hours and courses.		
	b. Develop proposal to present to full Board.		Proposal presented to Board by (date).
2	Clarify and simplify renewal late fee policy.	Executive Director Board	
	a. Benchmark against other similar regulatory agencies.		
	b. Determine appropriate pricing model and present to Board for approval.		New renewal late fee policy presented to Board by (date).
3	Evaluate ratio of contact and non-contact hours required.	Board Committee	
	a. Benchmark against other similar regulatory agencies.		
	b. If change required, determine appropriate model and present to Board.		Proposal presented to Board by (date).
4	Develop compliance procedure when hours not met.	Executive Director	
	a. Review current compliance model.		
	b. Develop strategies and clear compliance procedures if hours not met.		New compliance procedures presented to Board by (date).
5	Establish criteria and acceptance strategy for CEUs.	Board Committee	
	a. Identify task force or individuals to develop clear criteria for CEUs acceptance.		
	b. Benchmark against comparable regulatory agencies.		
	c. Develop recommendations for CEU criteria and acceptance strategy.		Recommendations presented to Board by (date).

Strategic Initiative #4		Owner	Measurable Outcomes
Create an effective and welcome communications strategy for all constituents.			
1	Improvement in internal communication and clearer directives to committees.	Board liaison to committee	
a.	Clarify committee roles and responsibilities and communicate clearly to committee chairs.		Roles and responsibilities clarified and communicated to committees.
b.	Develop strategies for communication with committees, including specific timelines for tasks, reports and feedback.		Committee work plans submitted and approved by Board liaison.
c.	Develop committee member "handbook."		
d.	Work with committees to identify needed support during and between meetings.		Committees have adequate support to complete tasks.
2	Updated compliance information readily available.	Executive Director	
a.	Create inventory of all the sites that need regular updating of compliance info.		Inventory created.
b.	Assign staff member to make regular updates.		Update plan established and functioning.
3	Evaluate possible use of social media to communicate with constituents.	Executive Director	
a.	Evaluate effectiveness and utility of using social media to communicate with a variety of audiences.		
b.	Develop recommendation for future use of social media, including strategy for making regular updates.		Recommendations provided to Board by (date).
4	Improve communication with schools.	Executive Director	
a.	Identify barriers in communicating effectively with schools.		
b.	Seek input from schools on how to establish an effective all-schools meeting.		
c.	If needed, seek task force or committee support to brainstorm effective strategies.		Increase in the positive feedback from all-schools meeting participants.
5	Improve information sharing with licensees.	Board	
a.	Identify barriers in communicating effectively with licensees.		
b.	Look at examples of other board communications "best practices"		
c.	Evaluate effectiveness of current strategies and develop recommendations for future mechanisms that eliminate ineffective means of communication and introduce new strategies.		Streamlined and effective communication strategies are in place.
6	Improve communications with licensed facilities.		
a.	Develop plan for effective communication specifically related to licensed facilities.		
b.	Create updatable database of facility contacts.		
c.	Identify materials and tools that may need to be modified to include language relevant to facilities.		
d.	Modify materials, tools, website, etc as needed.		Relevant and effective communication strategies are in place.
7	Develop written information for law enforcement and county officials/fairs.	Executive Director	
a.	Develop timeline of events around the state and identify key contacts.		
b.	Disseminate appropriate information.		Written information distributed in a timely fashion that encourages greater compliance.
8	Identify ways to recognize/acknowledge licensees	Board	
a.	Develop recognition strategies including newsletter stories and acknowledgements.		
b.	Identify mechanisms for licensees to share personal stories.		Increased recognition for licensees in place.
9	Improve presentation of compliance info (trends)	Executive Director	
a.	Identify what information is useful for policy and regulatory decisions.		
b.	Develop consistent presentation format for Board meetings so that trends over time can be more easily tracked and understood.		Consistent and effective trend information provided at Board meetings.

