

# American Academy for Medical Acupuncture

## AAMA Leadership Summit

August 21-24, 2008  
Hyatt Regency Hotel  
Dallas, Texas

### American Academy of Medical Acupuncture (AAMA)

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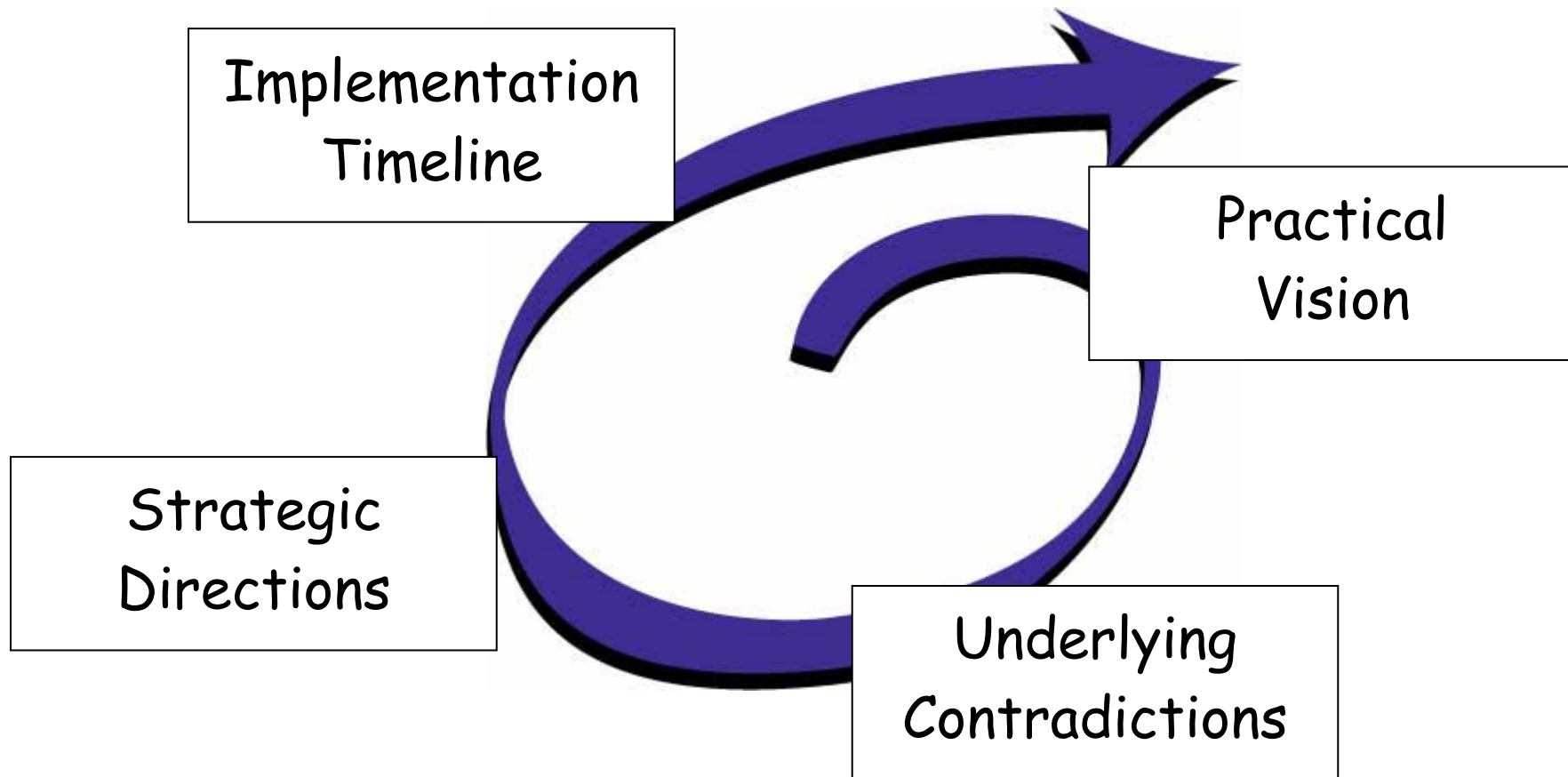
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Facilitated using ToP® methods by  
Marilyn Oyler and James Wiegel  
Partners in Participation LLC

PLANNING RETREAT OVERVIEW		
PARTICIPANTS	FOCUS QUESTION	AGENDA
<p>Thomas S. Burgoon  Stephen Burns  Tapan K. Chaudhuri  Claudia M. Cooke  David I. Cramer  Peter T. Dorsher  Jim Dowden  Jacqueline Germain  Brenda Golianu  Joseph M. Helms  Jeanne Heyser-Easterly  Richard F. Hobbs,III  Gene George Hong  John P. Kohler  Thom E. Lobe  Allen McDaniels  Maureen Murphy  Hiroshi Nakazawa  Richard Niemtzow  Thomas G. Noll  Vasudev M. Patel  John C. Reed  Montiel Theresa Rosenthal  Elizabeth H. Sebestyen  Ric Shumway  Linda M. Smith  Fred P. Swing  Pamela L. Vincent  Bradley J Williams  Rey Ximenes</p> <p>Facilitators  Marilyn Oyler  Jim Wiegel</p>	<p style="text-align: center;"><u>Focus Question</u></p> <p>Given the rapidly changing world of health care &amp; medical acupuncture now and over the next decade, how do we map a future of professional vision, rekindled camaraderie and effective adaptation to change through the Academy?</p>	<p><b>THURSDAY, AUGUST 21, 2008</b>  6:00 Reception, Wall of Wonder</p> <p><b>FRIDAY, AUGUST 22, 2008</b>  8:00 Practical Vision Workshop  11:30 Underlying Contradictions Workshop  12:00 Lunch  1:15 Completion of Underlying Contradictions Workshop  4:15 Strategic Directions Workshop  5:00 Adjourn, Dinner at Cattlemen's</p> <p><b>SATURDAY, AUGUST 23, 2008</b>  8:00 Completion of Strategic Directions Workshop  10:00 Strategic Directions Dramatic Presentations  10:45 Focused Implementation Workshop  12:00 Lunch  1:00 Implementation Working Groups  4:00 Closing Plenary  5:00 Adjourn. Celebration Dinner</p> <p><b>SUNDAY, AUGUST 24, 2008</b>  7:30 Board Meeting to Review and Plan Next Steps</p>

## ToP® PARTICIPATORY STRATEGIC PLANNING PROCESS



**The ToP® Participatory Strategic Planning Process** used in the development of this plan begins with a **Central or Focus Question** for Planning that comes out of the group's environmental scanning and organizational assessment. In the retreat, participants work to answer that question from 4 different perspectives: **Practical Vision** (What do we want to see in place in 3-5 years time as a result of our efforts?), **Underlying Contradictions** (What is currently blocking the full realization of our vision?), **Strategic Directions** (What practical, creative actions can we take, in the next year or 2, to deal with our contradictions and move us towards our vision?), and **Implementation Timeline** (What will we actually do in the next 12 months, next 90 days to get moving on this? Who will do what?).

*ToP® is a registered trademark of The Institute of Cultural Affairs who developed this Participatory Strategic Planning Process*

## EXECUTIVE SUMMARY

The focus question of this Strategic Planning retreat as identified by retreat organizers was:

**Given the rapidly changing world of health care & medical acupuncture now and over the next decade, how do we map a future of professional vision, rekindled camaraderie and effective adaptation to change through the Academy?**

This Executive summary reports the central decisions made by participants in the Strategic Planning Retreat in answer to this question. Participants created a Strategic Framework for focusing the organization over the next several years in relation to that question, and an Implementation Timeline of practical milestone accomplishments for the coming year that will launch full implementation.

The **Strategic Framework** identifies 3 important consensus decisions reached by retreat participants in answer to the focus question: the statement of their **Practical Vision** for the next 3-5 years, their **Underlying Contradictions**, the main obstacles and opportunities in the current reality of the organization which need to be addressed, and the statement of **Strategic Directions**, the focused directions for action that will address the Contradictions and move the organization to the full realization of its Practical Vision.

The **Implementation Timeline** identifies what will actually be done over the next 12 months to move things forward and who will do it. The complete report contains the back record of the discussed brainstorm items and the implementation planning groups created detailed implementation briefs for each accomplishment. These are available for review on the AAMA website in a separate documents.

## STRATEGIC FRAMEWORK:

Many conversations were held during the retreat. The 3 decisions below represent the core of the AAMA Leadership Summit's work, along with the implementation timeline which follows. Together, these answer the focus question of the retreat.

focusing our creative, practical actions in.. <b>STRATEGIC DIRECTIONS</b>	to deal effectively with . . . <b>UNDERLYING CONTRADICTIONS</b>	and realize our . . . <b>PRACTICAL VISION</b>
<p><b>REINVENTING AAMA</b></p> <ul style="list-style-type: none"> <li>➤ Reorganize Leadership</li> <li>➤ Raise &amp; Use Money Effectively</li> <li>➤ Create a Viable Work Force</li> </ul> <p><b>SUPPORTING MEMBERS' FINANCIAL SUCCESS</b></p> <ul style="list-style-type: none"> <li>➤ Develop New Insurance Approach</li> <li>➤ Outreach to Consumers</li> </ul> <p><b>TRANSFORMING HEALTH CARE THROUGH ACUPUNCTURE</b></p> <ul style="list-style-type: none"> <li>➤ Penetrating Structures of Health Care</li> <li>➤ Outreach to Physicians</li> </ul>	<ul style="list-style-type: none"> <li>➤ HOMOGENOUS VOLUNTEER MODEL IN HETEROGENOUS MEMBERSHIP</li> <li>➤ LEADERSHIP MODEL IS INSUFFICIENT FOR TODAY'S DEMAND</li> <li>➤ SENSE OF OVERWHELMING POWER OF STATUS QUO</li> <li>➤ PROTECTIONISM AMONG HEALTH CARE PROFESSIONALS</li> <li>➤ NAÏVE APPROACHES TO INSURANCE COMPANIES</li> <li>➤ DIFFICULTY OF COMMUNICATING COMPLEXITY OF HOLISTIC PRACTICE IN REDUCTIONISTIC SYSTEM</li> <li>➤ REVENUE MODEL INSUFFICIENT FOR TODAY'S DEMAND</li> </ul>	<ul style="list-style-type: none"> <li>➤ ACUPUNCTURE HAS BECOME INTEGRAL PART OF CLINICAL DECISION-MAKING</li> <li>➤ TOOLS AND SUPPORT FOR VIABLE PRACTICE MODELS</li> <li>➤ INFORMED CONSUMER DEMAND</li> <li>➤ FINANCIAL VIABILITY FOR PHYSICIAN ACUPUNCTURISTS</li> <li>➤ ORGANIZATIONAL COLLABORATIONS FOR INTEGRATED HEALTH CARE</li> <li>➤ FINANCIAL STABILITY FOR AAMA</li> <li>➤ CULTURE OF ORGANIZATIONAL COMPETENCY</li> <li>➤ OUTCOMES RESEARCH VALIDATES MEDICAL ACUPUNCTURE</li> <li>➤ POLITICAL CLOUT</li> </ul>

## FOCUSED IMPLEMENTATION

What will we actually do in the next 12 months?

STRATEGIC DIRECTIONS	August, September, October	November, December, January	February, March, April	May, June, July, August	Beyond
<p><b>REINVENTING AAMA</b></p> <ul style="list-style-type: none"> <li>➤ Reorganize Leadership</li> <li>➤ Raise &amp; Use Money Effectively</li> <li>➤ Create a Viable Work Force</li> </ul> <p>Jackie Germain, Fred Swing, Tom Burgoon, Elizabeth Sebestyen, Joe Helms, Steve Burns, Richard Niemtzow, Brad Williams, Rick Hobbs, Allen McDaniels</p>	<ul style="list-style-type: none"> <li>➤ Assess and resolve allied memberships Board Aug</li> <li>➤ Change volunteer structure / accountability: Board-Sept</li> <li>➤ Create an advisory panel Executive Committee: OPEN</li> <li>➤ Assess and develop strategy for fundraising: OPEN</li> <li>➤ Increase membership, actively market Symposium Fred, Tom &amp; Jackie</li> </ul>	<ul style="list-style-type: none"> <li>➤ Leadership development &amp; succession plan: Steve, Richard</li> </ul>	<ul style="list-style-type: none"> <li>➤ Re-establish formal budget approval process with business plan Allan McDaniels, Kevin Barry</li> <li>➤ Stabilize executive director / management contract Richard Hobbs, Jim Dowden, Allen Mc Daniels, Richard N.</li> </ul>		
<p><b>SUPPORTING MEMBERS' FINANCIAL SUCCESS</b></p> <ul style="list-style-type: none"> <li>➤ Develop New Insurance Approach</li> <li>➤ Outreach to Consumers</li> </ul> <p>Thom Lobe, Ric Shumway, Gene Hong, Rey Ximenes, Claudia Cooke, John Reed, Robert Schulman</p>	<ul style="list-style-type: none"> <li>➤ Website revision – committee, consultant Thom Lobe, Ric, Rey</li> <li>➤ Insurance liaison committee send out RFP: Robert, Gene, John</li> <li>➤ Links to other organizations through website: Claudia</li> <li>➤ Post and E/M Acu coding guideline on web: Ric</li> <li>➤ Viral YouTube video on ACU patient demo: Schulman +</li> </ul>	<ul style="list-style-type: none"> <li>➤ Clinical guidelines – consumers &amp; members Gene</li> <li>➤ I-P protection AAMA Medical Acupuncture Thom</li> <li>➤ Current videos brochures on line: Rey</li> <li>➤ Hire legal consultant: Robert-Board 11-08</li> <li>➤ Insurance response template 12-08: Robert, John, committee</li> </ul>	<ul style="list-style-type: none"> <li>➤ Billing consultant presentation: 1/09 and 4/09 Symposium (yearly-update) Robert, committee</li> <li>➤ Billing / coding booklet Yearly update: Robert, committee</li> <li>➤ New web site 4/09: Thom, committee</li> </ul>	<ul style="list-style-type: none"> <li>➤ 800 consultation service, web link after Symposium: Robert, committee</li> </ul>	
<p><b>TRANSFORMING HEALTH CARE THROUGH ACUPUNCTURE</b></p> <ul style="list-style-type: none"> <li>➤ Penetrating Structures of Health Care</li> <li>➤ Outreach to Physicians</li> </ul> <p>Hiroshi Nakazawa, Vasudev Patel, Jeanne Hesser-Easerly, Tapan Chaudhuri, Tom Noll, Montiel Rosenthal, Pam Vincent, John Kohler., Peter Dorsher, Linda Smith, David Cramer, Brenda Golianu, Elizabeth Sebestyen, Muareen Murphy</p>	<ul style="list-style-type: none"> <li>➤ Create an advisory panel for the specialties (Montiel) (Aug)</li> <li>➤ Establish point people SAR Brenda Aug)</li> <li>➤ Create talk (intro) template Peter Sep</li> <li>➤ Initiate the taskforce to Invite/ present to medical directors of insurance co.'s, start a dialogue John K Sep</li> </ul>	<ul style="list-style-type: none"> <li>➤ Increase volunteer pool to serve as point person Elizabeth Nov</li> <li>➤ Explore contact with AAO Jeanne Dec</li> <li>➤ Contact ACU schools to attend Symposium Linda, Pam Dec</li> </ul>	<ul style="list-style-type: none"> <li>➤ CME articles for Journal Apr</li> </ul>	<ul style="list-style-type: none"> <li>➤ Regional speakers bureau May Tom, Hiroshi</li> <li>➤ Database established for conditions &amp; efficacy of treatment to give clues for future studies Montiel Aug</li> <li>➤ 6 presentations to non HMI MD courses to build common ground: Elizabeth, V. Patel Aug</li> <li>➤ 4 Additional CME Peter, Tapan Aug</li> </ul>	<ul style="list-style-type: none"> <li>➤ Explore how to get recognized, become part of the AMA family</li> </ul>