

American Society for Reproductive Medicine

2021-2025 STRATEGIC PLAN DEVELOPMENT

Final Report

October 2, 2020



Strategic Plan Facilitation Work Plan

The following action steps were undertaken by Westman & Associates Consulting, LLC (W&A) to facilitate development of the American Society for Reproductive Medicine's (ASRM) 2021-2025 strategic plan:

Step 1 – Gather Documentation: I referenced the ASRM website and gathered documentation pertinent to my facilitation of the strategic planning process.

Step 2: Undertake Strategic Program Analysis: I teamed with ASRM staff to undertake a Strategic Program Analysis (SPA) – assessing the relevancy and potential future strategic direction of the Society's current products, programs, and Services (PPS). The assessment considered three criteria:

- Attractiveness of each PPS to ASRM and its members.
- ASRM's capabilities to effectively deliver each PPS.
- The strength of current and potential competitors' offerings vis-à-vis what ASRM offers.

As a result of these assessments, generic guidance was offered for each PPS as to whether it should:

- Be grown/expanded upon,
- Improved to overcome one or more identified weaknesses, or
- De-emphasized or discontinued.

Step 3 – Conduct Individual Interviews: I facilitated 35 in-person and/or telephonic interviews with selected ASRM member and staff leaders. Interview results contributed significantly to the identification of key strategic and operational issues that could influence strategic plan development.

Step 4 – Develop and Administer Survey 1: I prepared and administered a *Future Focus* survey to 435 selected ASRM stakeholders, with 209 respondents to the survey – an excellent response rate. The survey, building on the interview process, elicited feedback regarding which issues should be prioritized in the strategic plan development process.

Step 5 – Develop and Administer Survey 2: I prepared and administered a *Future Trends* survey to selected ASRM member leaders, to which nearly 40 individuals responded. The survey elicited feedback regarding 50 trends identified by the American Society of Association Executives as potentially impacting professional societies and other associations (i.e., which trends are most likely to impact ASRM in the future). Results were considered in the development of strategic plan goals and strategies.

Step 6 – Identify Possible Future Alternative Scenarios: I teamed with ASRM staff to identify three potential operating environments (scenarios) that the Society may encounter three years into the strategic plan implementation process – all of which could have profound impacts on ASRM's operations. These scenarios were subsequently referenced by retreat participants to identify how ASRM should consider responding strategically if one or more of the scenarios materialize.

Strategic Plan Facilitation Work Plan

Step 7 – Prepare Discussion Manual: I prepared a discussion manual summarizing results from the interviews, surveys, and strategic program analysis, along with providing a framework for discussion during the strategic planning retreat. This included examples of goal and strategy statements utilized by similar organizations.

Step 8 – Facilitate Planning Retreat: I facilitated a three-day planning retreat (via Zoom technology) including over 40 participants. The retreat resulted in a set of draft goals and strategies pertinent to ASRM’s next strategic plan.

Step 9 – Prepare Retreat Results Report: I prepared this report summarizing meeting results, as well as suggested templates for tracking and reporting progress on strategic plan milestones in future months and years.

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In addition to completed action steps, I will undertake Step 10 in the near future, and am available, if requested, to undertake Step 11.

Step 10 – Facilitate Debriefing Teleconference: I will facilitate a teleconference with selected ASRM leaders within a month of the planning retreat to address any questions or concerns relative to my report and provide guidance, as requested, in finalizing and implementing the strategic plan.

(Optional) Step 11 – Ad Hoc Post-Meeting Coaching/Assistance: I will be available to provide to-be-determined assistance in reaching closure on plan design and the implementation process. As a long-time non-profit organization CEO experienced in implementing strategic plans, I can also offer assistance during the implementation phase.

Strategic Planning Retreat Agenda

Following is the agenda that was utilized for the September 21-23, 2020 strategic planning retreat:

Day 1

Time Slot (EDT)	Discussion Topics	Facilitator
9:30 – 9:45 AM	Session Overview: <ul style="list-style-type: none"> • Introductions • Recap of retreat purpose and anticipated outcomes • Overview of World Café approach to meeting facilitation • Recommended ground rules 	Racowsky/Azziz/ Westman
9:45 – 10:00 AM	Goals and Deliverables of Strategic Planning Retreat	Racowsky
10:00 – 10:30 AM	Setting the Stage for Strategic Planning	Azziz
10:30 – 11:00 AM	Vision, Mission and Value Statements <ul style="list-style-type: none"> • Present approved statements • Discussion 	Racowsky/Azziz
11:00 AM	Break	N/A
12:00 – 1:15 PM	Survey Results Discussion – Key Insights Impacting Plan Design	Westman
1:15 – 2:30 PM	Goal and Strategy Statements <ul style="list-style-type: none"> • Definition, guidelines, and examples (full group) • Goal category identification (full group) 	Westman
2:30 – 3:00 PM	Break	N/A
3:00 – 5:00 PM	Goal and Strategy Statement Brainstorming – Round 1	Breakout Leaders
5:00 PM	Adjourn	N/A

Day 2

Time Slot (EDT)	Discussion Topics	Facilitator
9:15 – 9:30 AM	Recap Day 1/Set Stage for Day 2	Westman
9:30 – 11:00 AM	Goal and Strategy Statement Brainstorming – Round 2	Breakout Leaders
11:00 – 11:30 AM	Break/Prepare for Round 3	N/A
11:30 AM – 1:00 PM	Goal and Strategy Statement Brainstorming – Round 3	Breakout Leaders
1:00 – 1:30 PM	Break/Prepare for Round 4	N/A
1:30 – 2:30 PM	Goal and Strategy Statement Brainstorming – Round 4	Breakout Leaders
2:30 – 2:45 PM	Break/Prepare for Round 5	N/A
2:45 – 3:45 PM	Goal and Strategy Statement Brainstorming – Round 5	Breakout Leaders
3:45 PM	Adjourn	N/A

Strategic Planning Retreat Agenda

Day 3

Time Slot (EDT)	Discussion Topics	Facilitator
9:30 – 11:30 AM	Goal and Strategy Statement Finalization <ul style="list-style-type: none"> • Breakout leader presentations • Discussion and voting 	Westman
11:30 AM – 12:00 PM	Break	N/A
12:00 – 12:15 PM	Alternative Future Scenario Analysis <ul style="list-style-type: none"> • Process description • Introduction of scenarios 	Westman
12:15 – 1:45 PM	Goal and Strategy Modification Identification for Alternative Scenarios	Breakout Leaders
1:00 – 2:30 PM	Goal and Strategy Modification Recap <ul style="list-style-type: none"> • Breakout leader presentations • Discussion 	Westman
2:30 – 3:00 PM	Recap Progress and Discuss Next Steps <ul style="list-style-type: none"> • Tactic and Milestone Development • Plan Implementation and Board Reporting Guidelines 	Racowsky/Azziz/ Westman
3:00 PM	Adjourn	N/A

Draft ASRM 2021-2025 Strategic Plan Framework

The following mission, vision, and value statements were approved by the ASRM Board prior to the strategic planning retreat:

Mission

The American Society for Reproductive Medicine (ASRM) is dedicated to the advancement of the science and practice of reproductive medicine. The Society accomplishes its mission through the pursuit of excellence in evidence-based, life-long education and learning, through the advancement and support of innovative research, through the development and dissemination of the highest ethical and quality standards in patient care, and through advocacy on behalf of physicians and affiliated healthcare providers and their patients.

Vision

The American Society for Reproductive Medicine (ASRM) will continue to be the national and international leader for multidisciplinary information, education, advocacy, and standards in reproductive medicine and science, with the goal of ensuring accessible, ethical, and quality reproductive care for every person.

Values

At the American Society for Reproductive Medicine (ASRM) we value:

- Learning, including life-long education, scholarship, and the open sharing of information and knowledge.
- Discovery, including advancing the care of patients world-wide through innovative research and invention.
- Advocacy, including prioritizing patients' reproductive care and emotional well-being, access to care, reducing disparities, and the fundamental right to family building.
- Diversity, Equality and Inclusion, including a commitment to promote diversity within the ASRM membership and leadership and to promote access to quality reproductive care for all patients.
- Integrity, including honesty, trustworthiness, transparency, and ethics in all our interactions and initiatives.
- Collaboration, including collegiality, teamwork, and cooperation to achieve our mission and global vision.
- Excellence, including distinction and quality in all our endeavors.

Draft ASRM 2021-2025 Strategic Plan Framework

The following set of goals and strategies were identified and prioritized by strategic planning retreat participants through a polling process. They should be reviewed and fine-tuned by ASRM member and staff leaders prior to communication of the overall strategic framework to interested stakeholders:

Topical Area: Membership Recruitment and Engagement:

Goal: Every individual with interest in the field of reproductive health, science, and policy, domestic and international, has found sufficient value and is an engaged member of ASRM.

Strategies:

1. Young Professional Related – Incorporating to-be-finalized verbiage from the following three alternative strategy statements generated by breakout groups.
 - Engage younger members through multiple diverse communication channels.
 - Actively recruit and mentor young and diverse members.
 - Develop innovative technologies to learn the needs of the younger generation early in their careers to encourage membership and engagement in the society.
2. Increase engagement of Affiliate Societies, Special Interest Groups (SIGs) and Professional Groups (PGs) in ASRM leadership and member value creation.
3. General Member Engagement/Value Related – Incorporating to-be-finalized verbiage from the following four alternative strategy statements generated by breakout groups.
 - Utilize market and member research to determine which current and new member benefits will best serve ASRM in attracting and retaining new members.
 - Consolidate communication through a robust portal to give single point of access to diverse content, networking, and other valued resources.
 - Reimagine what membership in ASRM is, including but not limited to adding an opportunity for patient membership.
 - Provide opportunities for all members to satisfy all of their continuing education credit needs for licensure.

Topical Area: Patients:

Goal: ASRM is recognized as the premier trusted source for evidence-based, unbiased patient-oriented information regarding reproductive health and family building.

Strategies:

1. Provide resources to support inclusive reproductive care and diverse family-building options.
2. Include patients in the development of ASRM patient-facing and physician-facing educational materials.
3. Innovate and improve delivery of existing patient education content

Draft ASRM 2021-2025 Strategic Plan Framework

Topical Area: Advocacy:

Goal: ASRM uses the expertise and power of its membership to embrace science, educate the public, and advocate for national and international policies that advance science and clinical practice as well as expand access to reproductive care.

Strategies:

1. Establish a Center for Policy and Leadership.
2. Engage with medical societies, scientific organizations, insurance companies, and employers in advocating for reproductive health.
3. Increase Federal and state lobbying on reproductive health issues critical to patients and the providers who deliver their care.
4. Reduce barriers to reproductive care including cultural, financial, geographic, linguistic, legal, racial, emotional, socio-economic, and sexual/gender identity.

Topical Area: Research:

Goal: ASRM and its Research Institute will invest in promotion, support and mentorship for a diverse group of researchers in the clinical, translational, and basic reproductive sciences. ASRM and its Research Institute will communicate current and ongoing research findings and the impact of its investments to the ASRM membership and reproductive science community.

Strategies:

1. Increase the ASRM Research Institute endowment.
2. Support diverse areas of research in reproductive health, including but not limited to basic and clinical applications. **Note the following alternative statement for consideration:**
 - *Support diverse areas of research in reproductive science by ASRM members including but not limited to basic and clinical applications.*
3. Provide mentorship and support for young investigators to foster successful careers in reproductive health (science) research. **Note the following alternative statements for consideration:**
 - *Provide mentorship and support for junior investigators to foster successful careers in reproductive science research.*
 - *Encourage collaboration and networking in the field of reproductive science between the ASRM Research Institute-funded researchers and other researchers.*

Draft ASRM 2021-2025 Strategic Plan Framework

Topical Area: Organizational Sustainability:

Goal: ASRM has the leadership, infrastructure, resources, and expertise to lead the field by supporting the changing needs of its stakeholders, members, and their patients.

Strategies:

1. Financial Related – Incorporating to-be-finalized verbiage from the following four alternative strategy statements generated by breakout groups:
 - Identify new and diverse revenue streams and the capabilities to optimize them.
 - Identify fundraising opportunities.
 - Double ASRM's financial reserves in five years.
 - Optimize the utilization of internal and external resources to reduce waste.
2. Infrastructure Related – Incorporating to-be-finalized verbiage from the following two alternative strategy statements generated by breakout groups:
 - Implement new technologies and platforms to engage ASRM members and improve patient care.
 - Develop a nimble communication infrastructure.
3. Member Value Related – Incorporating to-be-finalized verbiage from the following eight alternative strategy statements generated by breakout groups:
 - Assess the portfolio of membership value, support, and current initiatives to make adjustments to the future needs of the membership.
 - Develop new strategies and approaches to recognize ASRM as valuable.
 - Discern the needs of early career and incoming members.
 - Expand multi-disciplinary engagement in the society through educational programs.
 - Increase involvement in ASRM volunteer opportunities.
 - Explore ways that ASRM can ensure private equity involvement does not cause untoward effects in terms of quality and ethics of patient care and autonomy and career satisfaction of medical professionals.
 - Engage young learners (as early as high school) in future careers in reproductive health.
 - Continually support guidelines development and recommendations that are valuable to our membership.

Next Steps and Wrap Up

Plan Framework Finalization

Although significant progress was made during the ASRM retreat in developing the Society's 2021-5 strategic plan, there is a need to fine-tune several of the goal and strategy statements. W&A specifically recommends consideration of the following:

- Membership Goal/Strategy 1: Reference the three alternative strategy statements brainstormed during the retreat to result in a single strategy statement pertaining to young professionals.
- Membership Goal/Strategy 2: Reference the four alternative strategy statements brainstormed during the retreat to result in a single strategy statement pertaining to generating more member engagement and/or perceived member value.
- Advocacy Goal: The goal statement is very comprehensive/multi-faceted. Consideration should be given to making it more focused.
- Research Goal: This goal statement is also very comprehensive/multi-faceted. Consideration should be given to making it more focused.
- Organizational Sustainability Goal/Strategy 1: Reference the four alternative strategy statements brainstormed during the retreat to result in a single strategy statement pertaining to financial sustainability.
- Organizational Sustainability Goal/Strategy 2: Reference the two alternative strategy statements brainstormed during the retreat to result in either a single strategy statement pertaining infrastructure or keep as is – one strategy statement pertaining to technology enhancement and the other pertaining to communications enhancement.
- Organizational Sustainability Goal/Strategy 3: Consider folding the eight alternative strategy statements under the Membership Goal, with many of these becoming tactics supporting one or more strategies.

W&A recommends that ASRM's senior staff take accountability for developing the next iteration of the strategic plan based on this guidance, along with considering additional output from the retreat (e.g., recommendations generated from the alternative scenario analysis as shown in Appendix 4). Once version two of the plan has been developed, W&A recommends the following sequence of action steps:

1. Review of the draft plan framework by Dr. Racowsky and the Executive Committee.
2. An opportunity for retreat participants to comment on the plan framework – as promised by Dr. Racowsky.
3. Potential additional finetuning of the framework based on retreat participant feedback.
4. Approval of the plan framework by the ASRM Board.
5. Staff development of an operational plan (i.e., tactics and milestones) to support goal/strategy attainment. Appendix 1 includes a template W&A typically recommends for this purpose.
6. Approval of the operational plan by the Board.

Plan Implementation Tracking and Refinement

Many strategic plans “sit on the shelf” once they are developed. ASRM member and staff leaders, to their credit, have given considerable attention to implementation of previous strategic plans and assuring the Board is apprised of implementation progress on a regular basis. W&A strongly encourages a continuing focus in this regard.

Appendices 2 and 3 of this report provide example templates for ASRM to consider – assuming a quarterly review of plan implementation progress. The review, in addition to tracking the status of specific milestones, should also offer the possibility of adding and deleting tactics and milestones to the plan based on changes in ASRM’s operating environment.

Potential W&A Future Role

Although the scope of W&A’s current project work ends with this report and a subsequent debriefing teleconference with selected ASRM leaders, I am available to serve as a sounding board and coach to staff in crafting version two of the strategic plan framework. Several previous clients have also utilized me in a similar capacity in crafting an initial set of tactics and milestones to support plan implementation.

Regardless of whether there is a continuing role for W&A to play, I have greatly appreciated this opportunity to serve the American Society for Reproductive Medicine. I wish you the best in finalizing and subsequently implementing the Society’s 2021-5 strategic plan and thereby progress in achieving your mission and vision!

Appendix 1: Template for Tactic/Milestone Development (for staff use)

Mr. Westman has personally used the following format in his capacity as a professional society CEO to document tactics and milestones supporting strategy attainment. It is included as an exhibit in his book, published by the American Society of Association Executives, titled Board and CEO Roles for Achieving Association Goals:

Organization “X” 201X-1X Tactics and Milestones

Goal 1: _____.

Strategies with Tactics Supporting Goal Attainment

Strategy 1: _____

Tactics/Accountability	Anticipated Milestones FY 201X	Anticipated Milestones FYs 201X-201X
Undertake _____ Board Lead: _____ Staff Lead: _____	<ul style="list-style-type: none"> • _____ 	<ul style="list-style-type: none"> • _____

EXAMPLE

Implement protocols and procedures for increasing continual engagement with corporate partners by Organization X volunteers and staff. Board Lead: _____ Committee Chair Staff Lead: _____	<ul style="list-style-type: none"> • Staff and volunteer roles, including _____ Committee charges, are updated by 9/30/1X and included in the board orientation manual. • FY1X corporate support commitments are obtained from all corporate partners by the end of each corporate partner’s budgeting cycle. 	<ul style="list-style-type: none"> • A corporate partner satisfaction survey is administered, with results presented to the board.
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Appendix 2: Template Quarterly Board Memo

Mr. Westman has personally used the following format in his capacity as a professional society CEO to report progress on milestone attainment and propose changes to the strategic plan framework. It is included as an exhibit in his book:

Board Memo Template

A total of 25 202X milestones pertaining to the 20XX-20XX strategic plan were approved by the board in December 202X. Following is the first quarter FY2X summary of performance vis-à-vis the milestones (see accompanying document). This includes:

- An indication of which milestones are complete, on-target, and delayed. If delayed, you will see commentary relative to the reasons for the delay and how we suggest proceeding.
- Requests to add, delete, or modify the milestones based on changes to the operating environment and other recent developments.

Through March 31, 202X (end of the FY2X first quarter):

- Five milestones have been completed.
- Fifteen milestones remain on target for completion.
- Three milestones are perceived to be delayed.
- Changes or deletions have been suggested for two milestones based on one or more of the following reasons:
 - ✓ Committee leadership direction;
 - ✓ Changes to external conditions; or
 - ✓ New information.

I anticipate adding the following tactic and milestones in support of the 202X-202Y strategic plan:

- Education Goal, Strategy A: As defined in the strategic plan.
 - ✓ New Tactic: As proposed.
 - New 202X Milestone: As proposed.
 - New 202X Milestone: As proposed.

Rationale for these additions, along with the accompanying budgetary and member/staff time implications are as follows. To make room in the budget and staff workloads for this tactic I include several recommendations for delaying progress on tactics that I perceive to be of lower priority or less time sensitive.

Appendix 3: Template Quarterly Strategic Plan Milestone Tracking

Example Milestones

C = Complete	O = On-Target
D = Delayed	R = Recommend Delete

Lead Committee	Staff Liaison	Strategy	202X Milestones	C	O	D	R	Comments
Education Strategy Task Force	John Doe	Migrate towards a new online education platform incorporating all Organization X-generated current and future educational content.	<ul style="list-style-type: none"> A request-for-proposal process results in selection of a part-time _____ contractor to team with the task force in implementing the new technology platform and leading ongoing platform administration. 	X				
			<ul style="list-style-type: none"> A needs assessment is completed to include a survey and focus groups, a digital publishing readiness assessment, and an implementation plan. 		X			The needs survey has been completed. All focus groups have taken place and the best practices audit is in process. The implementation plan is on target to be completed by November
			<ul style="list-style-type: none"> An education technology platform is identified and vetted, with a proposed vendor selected. 		X		May be delayed to the January 202X depending upon the timing of previous milestone completion.	
			<ul style="list-style-type: none"> A comprehensive technology plan and budget are developed by the selected vendor and task force, and subsequently approved by the Board. 			X	Likely early 202X.	
			<ul style="list-style-type: none"> To-be-determined implementation milestones depending upon progress made on previous milestones. 			X	Likely early 202X.	

Appendix 4: Alternative Scenario Input

Following are verbatim comments captured by scribes during discussions of the three alternative scenarios ASRM may encounter during implementation of its next strategic plan. On an annual basis, ASRM member and staff leaders should consider the extent to which its operating environment is trending towards these scenarios. Depending upon how strong the movement is, ASRM should consider embracing selected courses of action identified by retreat participants.

Scenario 1 – In-Person Meetings – The New Dodo Bird?

The COVID crisis continues unabated for years. Vaccines provide marginal, but insufficient protection from the virus. By January 1, 2024 the mindset of organizations and individuals has unalterably changed to avoiding physical contact between individuals to the greatest extent possible – not just related to COVID, but now also extending to the annual flu season and other contagious medical conditions. As a result, association annual and other in-person meetings no longer are planned and facilitated. Associations that previously relied heavily on such meetings for their relevance (i.e., continuing education and networking) must adjust or risk their very existence. New models for corporate engagement will be required for associations that rely heavily on annual meeting sponsorships, exhibits revenue, and other revenue streams associated with in-person meetings.

Membership Recruitment/Engagement : Potential Changes/Additions to Goal and Strategy Statements

- Increase social connections, replicate or brainstorm networking opportunities
- Define what value ASRM delivers to members
- Could be an opportunity to engage international members
- Commercializing online meetings to offset the advertising losses in the journal, etc.
- Remove barriers to accessing information through:
 - Reimagine the Congress, discuss the purpose of the meeting, brainstorm how best to deliver those elements to different constituents (includes networking)
 - Increase virtual meetings and contact opportunities
 - Increase on demand options
 - Consider micro-meetings (rather than one large meeting, consider regional meetings in lieu of/in addition to annual congress)
 - Broaden offerings (topics covered, speakers)

Appendix 4: Alternative Scenario Input

Patients : Potential Changes/Additions to Goal and Strategy Statements

- Increase supportive resources for delivering telehealth: training, how best to use available technologies
- Increase simultaneous, collaborative, interprofessional interaction with patients (MDs, mental health, genetic counselors, residents/med students, etc.)
- Develop virtual patient education offerings (webinars, podcasts, meetings, ASRM channel)

Advocacy : Potential Changes/Additions to Goal and Strategy Statements

- Support virtual advocacy meetings

Research : Potential Changes/Additions to Goal and Strategy Statements

- Collect data remotely when possible-shift to design that allows for that
- Disseminating information about how to continue research from Research Institute experiences
- Redefine the research agenda

Organizational Sustainability : Potential Changes/Additions to Goal and Strategy Statements

- Relevance
 - New technologies to potentially explore: 3-d expo hall, VR integration,
 - Need to be nimble to address topics that bloom quickly in a timely fashion
 - Strengthen the message that the products/information we offer is worth paying for
 - Survey members about what they want for the Congress (topics, delivery systems, pricing)
- Financial
 - Leverage relationships with industry to deliver connection with members in new ways
 - Appropriately value our virtual offerings with registration costs
 - Virtual work opportunities expand the pool of talented workers beyond those geographically available
 - Potentially rethink real estate needs (office and Congress under a hybrid model)
 - Increased need to invest in technological infrastructure to support flexible workplaces
- Protecting personal time of staff members in a working at home environment

Appendix 4: Alternative Scenario Input

Scenario 2 – An Insular World

A new crop of world leaders has emerged by January 1, 2024, with many embracing the “Me First” approach in their relations with other countries. This mindset has spread broadly throughout Europe, China, Japan, Korea, and other Asian countries – impacting commerce, scientific collaboration, and interest on the part of healthcare professions located outside of the United States to join “American” societies. ASRM’s counterpart societies in Europe and Asia have experienced an infusion of support (i.e., membership dues and intellectual capital) – making them more formidable competitors to ASRM’s leadership in the reproductive care arena.

Membership Recruitment/Engagement : Potential Changes/Additions to Goal and Strategy Statements

- Diversity membership offering for international members
- Redoubling on domestic members, young professionals (targeting the pipeline)
- Expand opportunities for ongoing international certification

Patients : Potential Changes/Additions to Goal and Strategy Statements

- Offer evidence-based education materials to international patients and advocacy organizations
- End of reproductive tourism
- Decreased private equity funding from international sources
- Potential adverse impact on drug prices (domestic prices would increase)
- Investment in infrastructure both nationally and international to improve communication

Advocacy : Potential Changes/Additions to Goal and Strategy Statements

- Improved efforts on access to care (domestic or internationally?)

Research : Potential Changes/Additions to Goal and Strategy Statements

- Provide incentives to increase contributions from international researchers
- Increased focus on international collaboration
- Promote importance of US based research to remain thought leaders
- Expand international membership on editorial boards of ASRM journals

Appendix 4: Alternative Scenario Input

Organizational Sustainability : Potential Changes/Additions to Goal and Strategy Statements

- Horizon scanners to identify areas for expansion and improvement to maintain competitive edge
- Loss of income from journals
- Expand SART registry usage internationally
- Attract and integrate international members now to cement relationships that can survive hypernationalism at the government level
- Outreach to countries in Latin America to form a Western reproductive medicine conglomerate
- Consolidation of AAGL, Endocrine Society, NAMS, NASPAG, SFP, SRI...
- Foster local and regional sub-societies

Appendix 4: Alternative Scenario Input

Scenario 3 – Big Fertility Explosion

In recent years individual practitioners and small practices have given way to corporate entities in the delivery of reproductive care. However, due to economic and regulatory factors, this trend has dramatically accelerated, to the point that by January 1, 2024 three-quarters of ASRM's members are employed by large corporate entities. These entities are less supportive of professional society engagement and instead prefer to rely on internal resources for meeting their employee's needs for continuing education, networking, and advocacy support.

Membership Recruitment/Engagement : Potential Changes/Additions to Goal and Strategy Statements

- This is a high risk because companies may not pay or find value in the membership.
- Possible solutions:
 - Add more attractive products not provided by the company:
 - Business management
 - Guidelines
 - Exclusive Benefits:
 - Insurance COE
 - Insurance reimbursement policies
 - Objective credentialing
 - Laboratory credentialing
 - Proprietary Education
 - Communicate with these companies.

Patients : Potential Changes/Additions to Goal and Strategy Statements

- The risk is there is not really any secret proprietary information that cannot be duplicated elsewhere.
- Possible solutions:
 - Create educational videos for patients on medication and other services (make ASRM the one stop shop instead of the drug companies)
 - Possible co-branding opportunities
 - Create a patient network, utilizing new technology / social platforms and explore what patients can provide for ASRM.
 - Examples:
 - Advocacy on ASRM's behalf to Fertility conglomerates, Insurance companies and Government
 - Philanthropic support
 - Promotion to Society may broaden our organizational framework and enhance value and relevance to both members and patients during these trying times.

Appendix 4: Alternative Scenario Input

Advocacy : Potential Changes/Additions to Goal and Strategy Statements

- The risk is that the companies could do this on their own.
 - They could craft their own language to benefit the practices in their network.
- Possible Solution:
 - There needs to be greater communication with individuals leading these companies.

Research : Potential Changes/Additions to Goal and Strategy Statements

- The risk of these companies performing their own research could have an impact on the ASRM Research Institute and there could be issues with interpretations of the data collected for research.
- The risk is that companies may not contribute financially to research endowment to fund the ASRM Research Institute.
- The threat is that research and outcomes could be skewed to benefit these organizations.
- Possible solution:
 - The value of the ASRM Research Institute is the infrastructure and if accessibility were increased the value would increase.

Organizational Sustainability : Potential Changes/Additions to Goal and Strategy Statements

- The risk is loss of membership, relevance, and voice.

Appendix 5: Tactics Brainstormed By Retreat Participants

Following are potential tactics brainstormed by strategic planning retreat breakout session participants that relate directly to strategies prioritized for inclusion in ASRM’s 2021-5 strategic plan framework:

Advocacy

Strategy	Potential Tactics
1. Establish a Center for Policy and Leadership.	<ul style="list-style-type: none"> • Train a large cadre of ASRM members as public advocates for reproductive issues • Undertake a public education campaign

Research

Strategy	Potential Tactics
1. Increase the ASRM Research Institute endowment.	<ul style="list-style-type: none"> • Link research with advocacy efforts. • Enhance philanthropic efforts within and outside of the organization. • Fund high quality projects that are not eligible for funding by other agencies. • Solicit/earmark funds for health disparities research. • Solicit funds from patients.
2. Support diverse areas of research in reproductive health, including but not limited to basic and clinical applications.	<ul style="list-style-type: none"> • Fund high quality projects that are not eligible for funding by other agencies
3. Provide mentorship and support for young investigators to foster successful careers in reproductive health (science) research.	<ul style="list-style-type: none"> • Identify and pair potential mentors and mentees for research collaboration across disciplines. • Develop the careers of young (junior) M.D.s/Ph.Ds/other burgeoning researchers • Develop strategies to work with other organizations for co-funding junior investigator research projects • Encourage collaboration and networking between the ASRM Research Institute-funded researchers and other researchers in their field of study.

Appendix 6: Parking Lot Input From Retreat Participants

Following are verbatim comments captured by scribes during the five strategic planning retreat breakout sessions:

Parking Lot – Membership Recruitment and Engagement:
Annual Congress live stream for patients
Consider patient membership/patient SIG
Donor conceived adults
Chairs meeting for All SIGs; PGs and affiliate societies with ASRM President
Actively recruit nurses, embryologists, psychologist, urologists, lawyers, reproductive managers, REI, OBGYNs with interests in reproductive medicine, etc.
Robust website/app
Map career pipelines to career choices in reproductive medicine nursing and embryology. Identify decision nodes and raise awareness at those points
Have a booth / advertise career opportunities at SSR meetings / to SSR members
Check with AAB and other regulatory agencies with regard to how to add credits for attending webinars and other various offerings by ASRM.
Investigate data around members who are minimal users of products, programs and services to determine what deterrents are to continuing membership.
Add auto renew to membership database. Make it harder for members to leave and investigate additional membership options. Look at opt out versus opt in.
Examine when people stop membership and the importance of fee structure.
Look at value added benefits of other organizations to determine what is the attraction and worth.

Appendix 6: Parking Lot Input From Retreat Participants

Parking Lot - Patients:
Access to patients, ASRM doesn't have a list of patients or a way to cultivate that list
Talk with other orgs to see how they fund patient education materials.
Add AI and search functions to website to improve usability
Develop plain language summaries of publications in F&S (ASRM and other authors).
Create an interactive space on RF.org that could contain summaries of published articles, patient stories, guide to reading scientific literature, volunteer to serve on patient panels, interact via social media and chat rooms, and capture contact information to continue the dialog.
Facilitate a network of influencers in the reproductive space including education and training.
Increase linkage from individual practices to ReproductiveFacts.org.
Create a cohesive education plan across all ASRM educational materials (patient facing).
Advocate for reproductive medical issues to legislative entities and third-party payers and empower patients to join in these efforts: Alternative Phrasing: Empower patients to join ASRM in advocacy for reproductive medical issues with legislative entities and third-party payers
Leveraging novel technology that is being used for telemedicine to disseminate content to patients (sending links to patients during Doximity call)
Develop a cadre of interactive ambassadors to promote patient education materials
Create an advisory committee that would be incorporated into ASRM work, including advocacy, philanthropy, material review and development.
Partner with other organizations to disseminate accurate content regarding conditions that could affect reproduction.
Develop branded interactive patient tools (such as patient success predictor, find a clinic, ovulation predictor)
Marketing campaign to reach patients.
Explore development of relationship category for patients to provide meaningful contributions to themselves and the ASRM community.
Develop a branded app with interactive tools (e.g., ovulation predictor tool, find a provider, success predictor tool).
Protecting patient safety in a challenging environment (how many embryos transferred, is the facility using proper precautions)
ASRM Seal of Approval on content developed outside ASRM
Education tool to explain how to pick a provider
Setting standards for the care of patients (Practice Committee documents)
Educate patients about genetic and reproductive privacy
Capture other topics including fibroids, normal v abnormal puberty, etc.

Appendix 6: Parking Lot Input From Retreat Participants

Parking Lot - Advocacy:

Advocacy should be linked to new opportunities to generate philanthropic revenue.

Develop metrics in order to measure non-ART access and progress

Advocate for education for the prevention of infertility and reproductive planning

Parking Lot - Research:

ASRM will serve as a clearing house for research that has already been published for research that affects IVF, reproductive health (associated with needs of membership). Focused research that impacts reproductive medicine should be addressed.

Research that is being done that affects reproductive medicine that ASRM may have issues with should be under the purview of ASRM to call out.

Evaluate current and ongoing research to determine the effectiveness or scientific merit of the research.

Develop a tactic (internally) a process to be inclusive of all areas. Consider developing a collaborative and innovative platform for research for future funded studies by ASRM.

Consider a set aside of monies to help investigators develop collaborative research infrastructures.

Hold strategic planning for the Research Institute every 3 years.

Create online community for researchers to find collaborators on a project.

Encourage replication studies.

Parking Lot – Organizational Sustainability:

Establish ASRM as the primary source for training and professional development in reproductive health.

Create a Task Force of internal and external forces to brainstorm revenue streams.

Possible Revenue Streams: Regional Meetings, Year Long CME Post Graduate Courses, Fund Raising, Advertising, and Additional Educational Offerings.

Set up a Task Force to speak to physicians in other fields who have experienced the downstream effects of Private Equity.