

OTA Strategic Goals: The Framework

Quality: Utilize the highest quality evidence to lead in the development of practice guidelines, standards, and metrics that ensure quality and value in the delivery of care for the orthopaedic trauma patient

Education: Serve as the worldwide authority and provider of education in musculoskeletal trauma utilizing innovative methods to deliver the highest quality educational content to an increasingly diverse population of healthcare providers and patients.

Research: Define orthopaedic trauma research needs and priorities, and establish independent funding mechanisms that foster a high quality, innovative portfolio of research projects to address those needs and advance orthopaedic trauma care.

Global Outreach: Promote the OTA as the primary global resource for orthopaedic trauma care through international collaboration while advocating for global trauma care and humanitarian assistance.

Advocacy: Advocate for orthopaedic trauma surgeons and providers by supporting careers through mentoring, working to improve wellness in physical and mental health, and shaping and influencing public policy regarding musculoskeletal injury care and the promotion of public safety.



Organizational Excellence: Strategic and Accountable Governance | Collaboration | Communications | Membership Growth and Resources



OTA Strategic Plan Objectives and Strategies 2020 - 2023

ADVOCACY

Advocate for orthopaedic trauma surgeons and providers by supporting careers through mentoring, working to improve wellness in physical and mental health, and shaping and influencing public policy regarding musculoskeletal injury care including the promotion of public safety.

Objective 1: Increase our role in shaping public policy by encouraging investment in research, promoting public safety, and elevating awareness of importance of orthopaedic trauma healthcare.

| Strategy | Metric | Committee | Target Timeline | Status |
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| Strategically work with the AAOS Office of Government Relations (OGR) to advocate for common issues and ensure annual OTA investment / support is effectively utilized | Participation of AAOS OGR liaison at OTA HP, Military, and Disaster Committee Mts. 2x per year Audit of annual AAOS OGR topics & issues presented to congress via AAOS advocacy efforts including annual Hill visits at NOLC | Health Policy Committee , ACS COT, Disaster, Military | OTA and AAOS Committee Mtgs. Annual Audit each Oct. | |
| Collaborate with the AAOS OGR (and other organizations) to facilitate "Good Samaritan Health Professionals Act" legislation, and other federal disaster response mechanisms, to support ortho trauma providers to assist in national disasters or mass casualties | | Disaster Management , Military | | |
| Create PSA's targeting prevention of orthopaedic trauma injuries, and develop cost effective platforms for reaching the widest possible audience. Consider partnerships with other organizations and agencies with shared policy agenda (AAOS, ACS /COT, POSNA, Trauma Prevention Coalition, etc.). | Creation (or re-circulation of past) PSA annually Analytics detailing distribution and audience reach Provide PSA in formats easily distributed by membership, and assess utilization | PR Committee , Patient Education, ACS COT, Military, Disaster Management Committee | 1 PSA launch by December 2021, 2nd PSA in 2022 | |

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| Create PR materials to promote and educate the general public of the value and importance of the orthopaedic trauma surgeon * note: video production re: importance of ortho trauma surgeons in progress | Completion and quality of video promoting the ortho trauma surgeon Analytics re: audience reach Survey data summary of membership use and satisfaction | PR Committee , SRI, Online Discussion, Patient Education, Disaster Management, International, Health Policy | Video target completion: Dec. 2020 Survey and Analytics: Oct. 2021 | |
| Advocate for orthopaedic trauma surgeons by helping to ensure/improve appropriate hospital resource allocation necessary for optimal care of patients. | - List of critical issues/resources of the OTA membership - Orthopaedic trauma position statements that clearly communicate and justify resources/policies/procedures critical for orthopaedic trauma surgeons in providing optimal patient care. - Strategy developed for effective communication channels that can be impactful in making changes based on these position statements. - Collaborative partnerships in place with organizations that can be impactful in creating position statements, and creating needed channels of communications. | Health Policy Committee , Practice Management Committee, ACS COT | March 2021 - Create list of key issues/resources October 2022 - Create plan and timeline for development of position statements. Also create communications strategy. | |

Objective 2: Address unique stressors impacting the profession of the orthopaedic trauma surgeon to improve overall surgeon mental and physical health.

| Strategy | Metric | Committee | Target Timeline | Status |
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| Annual membership survey / audit of the members to determine the elements for running a successful practice and having a happy life | Survey results and creation of proposal that includes actionable strategies to meet member needs | Practice Management , PR Committee, Membership | Survey: March 2021 Proposal: October 2021 | |
| Determine what existing resources are available and readily accessible to support surgeon mental and physical health, determine where gaps may exist, seek/create resources to fill those gaps | Detailed list of resources (including description of resource and instructions for accessing) made available to the OTA members. Report detailing gaps (based on list the survey results) and proposal for filling those gaps | Practice Management , PR Committee, Membership Committee | Resource List: March 2021 Proposal to fill gaps: October 2021 | |
| Create a communications plan to ensure OTA member awareness of resources | Detailed plan to promote resources. This will include OTA marketing and social media channels | PR Committee , Practice Management | March 2021 | |
| Consider creation of an OTA Wellness Committee or Task Force | Proposed committee charges demonstrating need/value. Annual meeting symposium / workshop focused on wellness and physician well being. Validated wellness score to determine prevalence of moral injury/ burnout of our members/ determine drivers of moral injury. | Governance Council , AM Committee | March 2021 | |
| Consider creation of an OTA Committee or Task Force to deal with surgeon workplace issues | Database of issues/ solutions and solutions for drivers of moral injury/ burnout | Governance Council | | |

Objective 3: Support Orthopaedic Trauma Surgeon careers through enhancing mentoring and professional satisfaction

| Strategy | Metric | Committee | Target Timeline | Status |
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| Develop and appoint a "Young Physicians Committee" with a goal of engaging young practitioners in the OTA, providing opportunities for leadership development, and establishing a young practitioner advisory body for feedback regarding OTA resources and strategic planning | Development of committee charges Success in accomplishing specific charges Committee engagement (participation) and success in achieving charges | Fellowship Committee , Membership, Practice Management, Governance | Proposed Charges: Oct. 2020 Committee appt: Nov. 2020 Committee audit/eval: March 2022 | |
| Continue and evolve the Young Practitioners Forum | Increased attendance and evaluation scores Review of past forum evaluation and member needs assessment; updated program addressing expressed gaps/needs | Practice Management Committee , AM Program Committee, Fellowship Committee, Membership | Report: Dec. 2020 - 2022 | |
| Develop and assess impact of OTA traveling fellowship program. | Fellows survey assessment and feedback Program site survey assessment and feedback Engagement of fellows over 3-year time period | Travelling Fellowship Committee , Fellowship Committee, Practice Management Committee | | |

Objective 4: Ensure that the OTA is both diverse and inclusive in regard to our membership and leadership

| Strategy | Metric | Committee | Target Timeline | Status |
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| Develop a diversity and inclusion strategy for the OTA | Completion of Diversity Task Force Charges: - Audit of OTA's current diversity in leadership and meeting presenter roles - 3-year plan to increase diversity - Creation of an OTA diversity statement - track member and fellowship applicant diversity | Diversity Committee Task Force , BOD | Audit: October 2020 3-year plan: March 2021 Statement: March 2021 | |

QUALITY

Utilize the highest quality evidence to lead in the development of practice guidelines, standards, and metrics that ensure quality and value in the delivery of care for the orthopaedic trauma patient.

Objective 1: Lead the profession in defining important and relevant orthopaedic trauma quality metrics

| Strategy | Metric | Committee | Target Timeline | Status |
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| Review existing standards, methods and measures in orthopaedic trauma care, and confirm their proficiency to improve quality and value for the orthopaedic trauma patient based on evidence and quality science. Using an evidence based medicine approach, determine where gaps may exist and seek solutions to filling those gaps. Simultaneously, inform the AAOS OGR about OTA priorities based on this EBM gap assessment. | Report detailing existing resources available and posted on the OTA website Gaps to be addressed confirmed Proposal to fill gaps | EBQVS, SRI, Research, Registry Project Team | Report: Oct. 2021 Gaps: Oct. 2021 Proposal: March 2022 | |
| Provide OTA members resources and recommendations to assist them to develop and implement systems and/or registry resources for quality improvement of musculoskeletal trauma care in their home centers. Consider registry partnerships that could afford OTA members well-vetted options of high value for orthopaedic trauma. | Determination of recommended resources confirmed. Details for use, value, benefits and access for each communicated to the membership, and posted on the OTA website | Registry Project Team, EBQVS, HP, SRI, Research, Classification and Outcomes | March 2021 (reviewed and updated annually) | |
| Partner with the AAOS in the development and revision of Clinical Practice Guidelines and patient safety position statements | Number of guidelines addressing key issues/gaps in orthopaedic trauma Number of guidelines inclusive of OTA input | EBQVS, SRI, Research | Ongoing, reviewed and reported on annually | |

EDUCATION

Serve as the worldwide authority and provider of education in musculoskeletal trauma utilizing innovative methods to deliver the highest quality educational content to an increasingly diverse population of healthcare providers and patients.

Objective 1: Serve as the pre-eminent authority and provider of evidence-based knowledge in musculoskeletal trauma providing the highest quality educational programs and resources for orthopaedic trauma surgeons and healthcare providers.

| Strategy | Metric | Committee | Target Timeline | Status |
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| Continue to develop the OTA's current portfolio of educational courses/resources for orthopaedic trauma care providers. Consider opportunities for enhancements to elevate educational quality and value, and audience reach. to include: resident/fellow education and specialty day, Annual Meeting and pre-meeting courses, core curriculum lectures, webinars, EBQVS resource list, etc. | - Report detailing OTA educational courses/resources to include a rating of value for each based on educational gap/need the course fills, and cost and audience reach, and specific suggested enhancements (as needed based on the Report) - Consider post-course meeting with chairs following each activity, asking specific questions vs a general discussion. Have chairs review activity evaluations - Work to achieve ACCME accreditation with commendation (highest level of accreditation) - Assess, refine case log requirements for fellowship accreditation; propose opportunities to refine training. | Education, AM Program; Fellowship, Fund Development, Online Discussion | Report: March 2021 Proposal for enhancements: October 2021 | |
| Review OTA's overall educational offerings and assess topical gaps, including non-clinical (ie, Disaster Response, wellness, practice management, fellowship program director (and other) educator program, etc.) | - Report outlining identified gaps in educational topics - Proposal for addressing gaps | Annual Meeting Committee, Education, Disaster, Military, Practice Management, BOD | Report 1: March 2021 Report 2: October 2021 | |
| Seek innovative and progressive methods to <u>expand</u> OTA's reach (including international reach) and deliver education to an increasingly diverse healthcare provider population (examples: online and live streaming of key educational events, virtual education platforms, addition of visiting professor program, virtual grand rounds, faculty training education, podcasts, journal club, etc.). Appoint task force inclusive of members of several committees. | Recommendations of the task force: target deadline December 2020. Recommendations should include details that outline educational need/gap addressed, target audience, proposed teaching format (including consideration of virtual education platforms), budget, etc. Assess incorporation of Disaster education into OTA and other education | Education, AM Program, Task Force?; Online Discussion, Patient Education, Publications, Disaster Committee | October 2021 | |
| Continue the development of OTA Online with emphasis on the living textbook, OTAI (new open access journal) and interactive online discussion forum for orthopaedic trauma care providers. Consider opportunities for enhancement of OTA Online and other online resources. | Review/report of the Wolters Kluwer partnership, both financially and in terms of growth and impact of educational resources, audience reach, etc. - Projected financial position vs. actual - Trends in usage since launch (site analytics measure of audience reach and demographics) - Metrics by resource usage: living textbook, JOT, R&G, video library, industry pages, etc. - User group survey results - Success of onboarding new resources in long range plan (R&G Live, R&G On-Call, Monograph) - Proposal for enhancements and new resources based on review | Publications Committee, Online Discussion Forum Sub-Committee, Education Committee | Report: July 2020 Proposal: Dec 2020 | |

Objective 2: Develop a forum for patient-based education and information regarding orthopaedic trauma injuries and care.

| Strategy | Metric | Committee | Target Timeline | Status |
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| Complete the OTA "For Patients" webpage; increase patient-based education to include a functional library of MSK injuries no later than December 2020 | Webpage analytics: volume of "hits" on patient-based education from North America and abroad - Member survey feedback measuring membership experience and satisfaction - Search engine metrics regarding patient searches and clicks - Develop patient/provider user groups to solicit feedback Consider additional supporting resources that support "For Patient" education (example: "For Patient" prescription pad) | Patient Education Project Team, Practice Management | Webpage: July 2020 Survey: July 2021 Enhancement Proposal: October 2021 | |

RESEARCH

Define orthopaedic trauma research needs and priorities, and establish independent funding mechanisms that foster a high quality, innovative portfolio of research projects to address those needs and advance orthopaedic trauma care.

Objective 1: Identify gaps in current orthopaedic trauma research and funding, and develop strategies to close these gaps.

| Strategy | Metric | Committee | Target Timeline | Status |
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| Task the SRI committee with continual evaluation of OTA research priorities and gaps via member surveys and leadership queries | Annual reporting of proposed current priorities to Board | SRI, Research, EBQVS | Annually each October | |
| Collaborate annually with the AAOS in the development of the Universal Research Agenda | Monitor alignment of Universal Research Agenda topics with identified research needs of the OTA | SRI, Research, EBQVS | Annually | |
| Continue collaborative funding relationships with other orthopaedic and non-orthopaedic partners including the AAOS, ORS, OREF, NIH, DOD, Aircast, and other subspecialty societies and explore alternative sources of research funding, independent of Industry support. | Dollars allocated to OTA research <u>in addition</u> to funds budgeted by OTA (ie, matching contributions from OREF and AO). Target goal: Minimum addition of \$200k + every 2 years | SRI, Research, EBQVS, Fund Development | Report annually in Oct. | |

Objective 2: Generate research interest among young traumatologists and prepare them for careers in research.

| Strategy | Metric | Committee | Target Timeline | Status |
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| Annual Meeting Symposium: "How to Get Started in Orthopaedic Research" | Annual research symposium submission by SRI/Research Committee Measure number of attendees; solicit feedback | SRI, Research, AM Program Committee, Young Practitioners Forum | Annually each October | |
| Identify Research Programs by other providers and either co-brand or market to OTA members | Number of programs that are aligned with OTA research priorities and gaps, and/or those that provide training for research investigators Number of participants/scope of study | SRI, Research, Young Physicians Committee, Membership | Annually, reported each March and October | |
| Establish mentoring program pairing new members with established researchers (note: SRI Committee is in process of re-launching this, will be good to add metrics) | Number of participants, annual program evaluation survey to participants | SRI, Research, Young Physicians Committee | | |

Objective 3: Prepare and educate researchers to compete for higher level funding; provide robust, ongoing research and collaboration opportunities.

| Strategy | Metric | Committee | Target Timeline | Status |
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| Consider reinitiating Annual Meeting Symposium: "Research grant application – How to maximize your success" | Measure number of symposium attendees; symposium evaluation results | SRI, Research, Basic Science, AM Program Committee | | |
| Consider offering OTA seed grants for "early-career" researchers. | Track research productivity, presentation, and publications of grant recipients | Research, SRI | | |
| Identify and fund prospective young researchers to attend/participate in collaborative organizational research training programs (AAOS, ORS, OREF, etc.) | Monitor interest in program and track research productivity of funding recipients | Research, SRI, Fund Development, Membership | | |
| Continue to increase funding of the OTA grant programs | Federal grant awards for previous OTA grant recipients | BOD, Fund Development, Research, SRI | | |

GLOBAL OUTREACH

Promote the OTA as the primary global resource for orthopaedic trauma care through international collaboration while advocating for global trauma care and humanitarian assistance.

Objective 1: Develop and make available resources that will expand and facilitate orthopaedic trauma education and research opportunities to the global audience, while being inclusive to the needs of different cultures and variable resources across the globe.

| Strategy | Metric | Committee | Target Timeline | Status |
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| Develop a task force to help identify the educational needs of the developed and developing global orthopaedic trauma community. | Appointment and charges of a task force, possibly under Humanitarian Committee Report identifying and prioritizing gaps/needs in ortho trauma globally. Obtain IOTA needs assessment/member survey | BOD/Governance Committee, International Committee, Humanitarian Committee, IOTA | Task Force appointment: October 2020 Report: October 2021 | |
| Based on reports identifying educational needs, and OTA Online analytics that detail global reach of OTA Online, create a plan to expand the reach (of low, middle and high income countries). | Increase in OTA Online usage stats based on task force identification of countries to target (based on need, gaps, etc.) Funding mechanisms developed to support OTA Online expansion Evaluate implementation of content for Low Income Countries Ensure OTA listens to representatives of under-resourced communities, rather than suggesting that we will | Publications, Finance, Int'l, Humanitarian, IOTA, Fund Development | October 2022 | |

Objective 2: Expand international collaboration for the global improvement of orthopaedic trauma care as a founding and lead member of IOTA.

| Strategy | Metric | Committee | Target Timeline | Status |
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| Prioritize a collaborative and comprehensive international agenda amongst the key participants including the OTA International Committee and IOTA leadership | Participation of international societies/members (IOTA members, and others) at the OTA Annual Meeting (attendance, and as presenters on the program) - international member growth and engagement - consistent/high Participation of Guest Nation membership | Int'l Committee , Humanitarian Committee, IOTA | Ongoing | |
| Ensure strong support and participation of the IOTA Triennial Meeting (in 2020 and on an going basis) | Participation of OTA leadership at the Triennial Meeting - Presenter presentation by OTA members - Continued OTA Leadership participation / representation at international orthopaedic trauma-based meetings | BOD , Int'l Committee, IOTA | Dec. 2020 Triennial Meeting, and ongoing | |
| Encourage participation from Low Income surgeons in the OTA annual Meeting and IOTA and within the OTA in general. | Participation of international societies/members (IOTA members, and others) at the OTA Annual Meeting (attendance, and as presenters on the program) - international member growth and engagement, including individuals from developing nations - consistent/high Participation of Guest Nation membership. | Humanitarian Committee , IOTA | | |

Objective 3: Establish educational resources that facilitate orthopaedic trauma care delivery during humanitarian crisis and disaster for both the North American and international communities.

| Strategy | Metric | Committee | Target Timeline | Status |
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| Consider re-establishing the Disaster / Mass Casualty Response course or a next iteration of that programming to meet the needs of the international audience | Report and recommendation from the Disaster Committee; engage IOTA in discussion | Disaster Committee , AM Program Committee, Military Committee | March 2021 | |
| Collaborate with the AAOS Office of Government Relations to facilitate "Good Samaritan" legislation that supports orthopaedic trauma providers to assist in national disasters or mass casualties | 1. Maintain regular communication with AAOS OGR director re: easing response barriers and enhancing liability protections during national crises. 2. Consider internal OTA registry of members registered/precleared with their state Medical Reserve Corps or equivalent response agency. 3. Provide references for interested members to register for ready response in their area. | HP Committee , Disaster Committee, Military Committee; ASC COT representatives | 1. Report Annually 2. March 2021 3. March 2021 | |
| Support OTA engagement in response to international disasters, world pandemics, and mass casualties by establishing partnerships with the AAOS, ACS, NGO's and federal agencies | 1. Re-engage ACS Operation Giving Back and AAOS for interest in tiered response registry. 2. Query American Red Cross and other NGO for interest in a registry or similar listing of willing and prepared responders. | Disaster Committee , Military Committee, HP Committee; ACS COT representatives | 1. October 2021 2. October 2021 | |

ORGANIZATIONAL EXCELLENCE

Permeates through each of the domains. It is an enabler.

Objective 1: Strategic, Transparent and Accountable Governance

| Strategy | Metric |
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| Curate a governance and leadership culture that is strategic, innovative, inclusive, and accountable. | Diversity Task Force: well developed proposal to achieve task force charges Annual Strategic BOD Retreat Annual BOD Assessment Develop skills matrix for BOD/PL and committee composition (share with Nominating Committee and Committee on Committees) |
| Adopt and maintain legal fiduciary responsibilities including the Duty of Care, Duty of Loyalty and Duty of Inquiry. | Annual Leadership Orientation Annual Audit Annual report, tax, and state filings |
| Ensure adequate resources to achieve society goals including financial resources, infrastructure, technology, training and staffing. | Development of a 3-year fund development strategic plan; emphasize internal donations/culture of giving, and solicit larger donors |

Objective 2: Collaboration and Inclusivity

| Strategy | Metric |
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| Seek collaborative opportunities with organizations that can contribute to advancing the OTA mission and goals. | Maintain positive, consistent communications with organizations aligned with the OTA mission. Ensure annual (or as needed) reporting from OTA Liaisons with related professional societies |
| Create a culture of collaboration and inclusivity among the OTA membership and leadership (inclusivity includes gender, race, age, ethnicity, etc.). | Diversity Task Force: well developed proposal to achieve task force charges |

Objective 3: Communication

Strategy

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| Ensure timely, informative, and transparent communications to the membership, and others impacted by orthopaedic trauma. | Continuation and enhancement of communications and marketing strategy |
| Create channels of communication to ensure the OTA leadership receives input and feedback from the membership and others impacted by orthopaedic trauma. | BOD review of AM evaluation summary, as well as course evaluation summaries. Member needs assessment every 3rd year Members business meeting held twice annually |
| Provide opportunities, programs, and technology platforms that facilitate communications and networking among members. | Assessment and enhancement of OTA Online, OTA Online Discussion Forum, OTA AM app, weekly newsletter, broadcast email communications, OTA website. |

Objective 4: Membership Growth and Resources

Strategy

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| Promote membership growth globally to all who can benefit from OTA resources to improve patient care and advocate for orthopaedic trauma surgeons. | Continue IOTA collaboration, and OTA membership promotion Continue to enhance the Guest Nation Program Evaluate international member benefits; consider enhancements Continue to evaluate international tier dues; evaluate and adjust as needed Seek funding for low income countries |
| Continually evaluate OTA benefits and resource utilization; identify gaps and opportunity for expansion and enhancements which will further advocate for and support career development of the orthopaedic trauma surgeon. | Support strategic plan strategies |
| Enhance the OTA member database to include "linked-In like" fields for the purpose of tracking research interests, sub-specialty interests, etc. | Successful incorporation of new fields Targeted use of the information |

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