

Society for Pediatric Sedation

2025-2028 STRATEGIC PLAN DEVELOPMENT

Final Report

June 17, 2025



Strategic Plan Development Overview

Background

Westman & Associates Consulting, LLC (W&A) was engaged to facilitate development of the Society for Pediatric Sedation's (SPS's) new strategic plan, to include consideration of:

- A new vision statement,
- A reconfirmed or new mission statement,
- Goals and strategies to support attainment of SPS's mission,
- Tactics to operationalize the strategic plan,
- Guidance in the development of milestones to plan for and track plan implementation progress, and
- Defined methodologies to employ during plan implementation to:
 - Continually assess SPS's infrastructure needs and abilities to accomplish strategic goals.
 - Systematically add, delete, and in other ways modify the strategic plan as warranted by changes in the operating environment.

Methodology

The following action steps were undertaken by W&A to facilitate plan development:

Step 1: Gathered and reviewed documentation.

Step 2: Conducted individual interviews with selected SPS leaders.

Step 3: Developed and administered two key stakeholder surveys addressing plan development topics.

Step 4: Prepared a discussion manual summarizing results from the interviews and surveys, along with providing a framework for discussion during the strategic planning meeting.

Step 5: Facilitated a strategic planning meeting June 7-8, 2025.

Step 6: Prepared this final report.

In addition to the above steps, W&A will facilitate a debriefing teleconference with appropriate SPS leaders and may, if requested, provide coaching assistance in finalizing tactics and milestones supporting strategic plan attainment.

Strategic Planning Meeting Agenda

Following is the agenda that W&A utilized during the strategic planning meeting. It may prove helpful in the future as consideration is given to developing SPS's next strategic plan.

Day 1 – June 7, 2025

Time Slot	Discussion Topics	Facilitator
7:00 – 8:00 AM	Breakfast	N/A
8:00 – 8:15 AM	Session Overview: <ul style="list-style-type: none"> • Introductions • Recap of meeting purpose and anticipated outcomes • Convey World Café approach to meeting facilitation • Finalize meeting ground rules 	Mary Landrigan-Ossar/ Thorner/Westman
8:15 – 9:15 AM	Setting the Stage: <ul style="list-style-type: none"> • Discuss Survey Results – Key insights impacting plan design • Provide overview of strawman strategic plan 	Thorner
9:15 – 10:00 AM	Vision and Mission Statements <ul style="list-style-type: none"> • Discuss Vision and Mission statement options • Reach consensus or identify next steps to achieve consensus 	Westman
10:00 – 10:15 AM	Break	N/A
10:15 – 10:45 AM	Goal and Strategy Statements <ul style="list-style-type: none"> • Convey definitions, guidelines, and examples • Confirm priorities to address • Review strawman goal and strategy statements 	Westman
10:45 AM – 12:15 PM	Goal and Strategy Statement Brainstorming – Round 1	Breakout Leaders
12:15 – 1:00 PM	Lunch	N/A
1:00 – 2:00 PM	Goal and Strategy Statement Brainstorming – Round 2	Breakout Leaders
2:00 – 3:00 PM	Goal and Strategy Statement Brainstorming – Round 3	Breakout Leaders
3:00 – 3:15 AM	Break	N/A
3:15 – 4:15 PM	Goal and Strategy Statement Brainstorming – Round 4	Breakout Leaders
4:15 – 4:30 PM	Recap Day 1 and Adjourn	Thorner/Westman

Strategic Planning Meeting Agenda

Day 2 – June 8, 2025

Time Slot	Discussion Topics	Facilitator
7:00 – 7:30 AM	Breakfast	N/A
7:30 – 7:40 AM	Setting the Stage for Day 2	Westman
7:40 – 8:00 AM	Vision and Mission Statement Review	Thorner
8:00 – 10:15 AM	Goal and Strategy Finalization <ul style="list-style-type: none">• Facilitator Presentations• Discussion and Voting	Breakout Leaders/ Westman
10:15 – 10:35 AM	Break/Hotel Check Out	N/A
10:35 – 11:35 AM	Tactics and Milestones Overview <ul style="list-style-type: none">• Convey definitions, guidelines, and examples• Brainstorm tactics – if time permits	Thorner
11:35 – 11:45 AM	Recap Progress and Discuss Next Steps	Westman
11:45 AM	Adjourn (lunch not provided)	Pradip Kamat

SPS 2025-2028 Strategic Plan Framework

Overview

W&A, in collaboration with Ruggles' Joye Stewart and Stewart Hinckley, developed a strawman strategic plan for consideration by SPS member leaders during their June 7-8, 2025 strategic planning meeting in Atlanta, Georgia. Following breakout group and full group discussion, a vote was taken by a quorum of SPS Board members to approve the following components of SPS's next strategic plan.

Vision Statement: Safe Sedation: Every Child, Every Time



Mission Statement: Setting the standard for evidence-based pediatric sedation through research, multidisciplinary education, and high-quality care.

Goal and Strategy Statements:

Topic: Membership & Engagement

Goal: Every team member and institution participating in pediatric sedation values SPS membership as indispensable.

Strategies:

1. Improve brand marketing to enhance SPS visibility.
2. Define and then market SPS individual and institutional value.
3. Develop structured pathways for member recruitment, retention, and engagement.

SPS 2025-2028 Strategic Plan Framework

Goal and Strategy Statements (continued):

Topic: Research

Goal: Promote pediatric sedation research to support SPS's mission.

Strategies:

1. Strengthen the PSRC database for research and quality improvement projects.
2. Create a sedation digital journal.
3. Expand SPS research to include prospective studies.

Topic: Education

Goal: Develop and disseminate educational content that reflects the needs of all pediatric sedation team members.

Strategies:

1. Create standardized pediatric sedation educational materials for all provider types and settings in collaboration with key stakeholders.
2. Restructure the SPS Sedation Provider Course to ensure a consistent learner experience, to improve cost efficiency, and to reduce faculty burden.
3. Explore feasibility of a physician fellowship program in pediatric sedation.

Topic: Organizational Sustainability

Goal: SPS operations are optimized to achieve a balanced budget net of investment returns (neutral or positive margin) within 3 years.

Strategies:

1. Assess current and explore future revenue streams.
2. Maximize operational efficiency.
3. Improve financial viability of the annual conference.

Tactic and Milestone Development

Tactics Overview

Tactics fall outside the bounds of most strategic plans – picking up where strategies leave off. Tactics are specific actions that will be taken to support strategy attainment. They are typically phrased starting with a verb.

During the Atlanta strategic planning meeting, considerable time was spent articulating an initial set of tactics to support attainment of SPS's new goals and strategies. This resulted in approval by a quorum of the SPS board of the following:

Board Approved Tactics

Membership Goal: Every team member and institution participating in pediatric sedation values SPS membership as indispensable.

Strategy 1: Improve brand marketing to enhance SPS visibility

- **Tactic:** Revise the logo to reflect the new vision statement.
- **Tactic:** Define the platform(s) and target audiences.
- **Tactic:** Develop and launch a social media/marketing strategy that includes ramping up website Search Engine Optimization (SEO).
- **Tactic:** Promote awareness of SPS's new vision and logo through the COE initiative.
- **Tactic:** Provide COE designees with a marketing/education toolkit featuring the new logo and vision statement for hospitals (waiting rooms, etc.)

Strategy 2: Define and then market SPS individual and institutional value.

- **Tactic:** Clarify what institutions and individual team members value in SPS membership.
- **Tactic:** Review and revise current collateral materials relating to SPS membership.
- **Tactic:** Create awareness with regulatory, certifying, and accrediting organizations (JCAHO, DNV, CMS, AHQRI, MAGNET, etc.)
- **Tactic:** Facilitate introduction of new members to other SPS members within their organization/institution.

Tactic and Milestone Development

Board Approved Tactics (continued)

Membership Goal: Every team member and institution participating in pediatric sedation values SPS membership as indispensable (continued).

Strategy 3: Develop structured pathways for member recruitment, retention, and engagement.

- **Tactic:** Establish recurring engagement opportunities through member spotlights, virtual opportunities, social media, new member hospitality, membership and career development forums, etc.
- **Tactic:** Assure member data is periodically reviewed and updated for accuracy.
- **Tactic:** Provide easy access alpha listing of member first/last name only (not protected in members' section) for targeted member outreach.
- **Tactic:** Provide access to more detailed member information that is available only to members.
- **Tactic:** Develop structured pathways for member engagement:
 - Invite someone to a membership committee meeting to speak about recruitment and retention (2025 Annual Conference).
 - Invite someone to the NAH committee meeting to speak about recruitment and retention.
 - Conference meet and greet social event with leadership (\$\$).
 - Develop pathway specific to recruitment of dental membership.
- **Tactic:** Develop structured pathways for leadership development (**e.g.,** invite someone to membership committee to speak about leadership and mentoring development).
- **Tactic:** Reach out to first time conference participants and meet with them virtually prior to the conference.
- **Tactic:** Allow new members to opt in to email introductions to committee chairs/board members based on interest.

Tactic and Milestone Development

Board Approved Tactics (continued)

Research Goal: Promote pediatric sedation research to support SPS' mission.

Strategy 1: Strengthen the PSRC database for research and quality improvement projects.

- **Tactic:** Integrate EMR data into the PSRC database – allow for more sites' participation (avoid manual entry) and include other locations (ED). Standardization of templates for clinical flowsheets and sedation progress note to include database variables. The progress note will serve for research, regulatory bodies, clinical care, and billing (5–10-year project). Investigate the new ASA/Epic integration.
- **Tactic:** Suggested workflow for data entry -- Create a toolkit explaining how different institutions have streamlined data entry.
- **Tactic:** Survey SPS member institutions to identify possible research and QI variables for the PSRC.

Strategy 2: Create a sedation digital journal.

- **Tactic:** Establish a special working group to determine feasibility – submission portal, editorial board, reviewers, platform for publication and distribution. Prioritize junior faculty representation in the task force.
- **Tactic:** Explore partnership with currently available clinical journals (either as a final product or stepping stone) (Peds Annals?).

Strategy 3: Expand SPS research to include prospective studies.

- **Tactic:** Revise criteria for SPS Scholarly Grant (cost of the project can exceed the grant amount but SPS can contribute a flat amount). For projects that cost less than the grant amount, SPS would only cover the cost of the project.
- **Tactic:** Research budget allocation -- Promote prospective research advocating research committee budget for one PSRC grant award (currently there are two awards) and allocate more funding to the Scholarly Grant.
- **Tactic:** Allow SPS members to access research mentorship through the SPS website. Encourage RC members to act as research mentors. Create a network of researchers and their interests – allow for collaboration and mentorship.

Tactic and Milestone Development

Board Approved Tactics (continued)

Education Goal: Develop and disseminate educational content that reflects the needs of all pediatric sedation team members.

Strategy 1: Create standardized pediatric sedation educational materials for all provider types and settings in collaboration with key stakeholders.

- **Tactic:** Assemble a task force of key stakeholders.
- **Tactic:** Analyze utilization of current sedation educational materials - collating current SPS educational materials and establish archive:
 - PPS handbook? Who owns it? 2nd edition?
 - Identify currently collected utilization data.
 - Conduct needs assessment to drive the future creation of educational materials.
- **Tactic:** Fill in the gap info.
- **Tactic:** Explore alternate platforms to develop and deliver SPS educational materials.
- **Tactic:** Create training and credentialing pathways for sedation team members.
- **Tactic:** Create a task force for researching the viability/feasibility of developing an RN PPS certification exam.
- **Tactic:** Confront intellectual property of educational materials.

Strategy 2: Restructure the SPS Sedation Provider Course to ensure a consistent learner experience, improve cost efficiency, and reduce faculty burden.

- **Tactic:** Determine viability of partnership with Laerdal.
- **Tactic:** Review the financial structure of the PC. Review and standardize.
- **Tactic:** Rebrand SPS PC name and marketing to increase inclusivity(RN,CCLS, etc.).
- **Tactic:** Train the trainer in person/virtual offering for Platinum level members utilizing partnership with Laerdal.
- **Tactic:** Collate all PC materials: SPS annual, PAS, PCCM, PHM, AAP.

Strategy 3: Explore feasibility of a physician fellowship program in pediatric sedation.

- **Tactic:** SPS leadership writes a letter to the editor on SAFE-PPS study.
- **Tactic:** Create a task force to determine how to support this concept.
- **Tactic:** Obtain info from ACGME regarding developing this fellowship.

Tactic and Milestone Development

Board Approved Tactics (continued)

Organizational Sustainability Goal: SPS operations are optimized to achieve a balanced budget net of investment returns (neutral or positive margin) within three years.

Strategy 1: Assess current and explore future revenue streams.

- **Tactic:** Define, review, and optimize current sources of revenue (including annual conference and COE); develop cadence on dues and registration rate review.
- **Tactic:** Review risk tolerance of the current investment portfolio diversification; develop cadence for future review.
- **Tactic:** Identify, develop, and implement new sources of revenue:
 - Create Gift Acceptance Policy for donors to make gifts/estate planning
 - Market job postings site (currently no listings).
- **Tactic:** Maintain reserves sufficient to cover 3 years of operating costs (not including costs of annual conference).

Strategy 2: Optimize operational efficiency.

- **Tactic:** Explore/evaluate Ruggles capabilities for in-house development of any technology program.
- **Tactic:** Review current LMS provider and potentially replace it. *Include exploring development in house by Ruggles.*
- **Tactic:** Membership data and analytics: attrition, new member trends, non-member registrant conversion, specialty determination in member records.
- **Tactic:** Explore the use of AI.

Strategy 3: Improve financial viability of the annual conference.

- **Tactic:** Assess cost per CME/CEU of SPS vs. comparable conferences.
- **Tactic:** Assess cost of SPS conference venue options (hotel vs. institution vs. conference center).
- **Tactic:** Collaborate with corporate partners to include hospitals for new vendor revenue stream to include advertising.
- **Tactic:** Explore the possibilities of hybrid options (alternating hybrid/in-person conference? Live streaming?).
- **Tactic:** Reopen dialogue with Audio Digest or issue an RFP.

Milestones Overview

Depending upon the type of tactic, as described above, it can be helpful to articulate one or more milestones (i.e., accomplishments) to help drive implementation and assess when tactics have been fully implemented. W&A has provided Ruggles with a potential format for use in articulating tactics. However, we understand Ruggles has identified an alternative format that may better serve SPS. Regardless of the format used, W&A recommends assignment of member leader and staff accountabilities for each tactic. We also recommend defining which milestones will be targeted for accomplishment during the first year of plan implementation and those targeted for future years.

Beyond Strategic Plan Development

Plan Implementation Tracking and Refinement

Many strategic plans “sit on the shelf” once they are developed. W&A strongly encourages diligence on the part of SPS member and staff leaders to assure this does not happen with this plan.

W&A has provided Ruggles example templates for SPS to consider using – 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 SPS’s operating environment.

Potential W&A Future Role

As articulated in our proposal, W&A consultants are available to coach SPS representatives in their efforts to fine-tune tactics. We also have association CEO-level expertise that may prove helpful during the implementation process. Regardless of whether there is a continuing role for W&A to play, we have greatly appreciated this opportunity to serve SPS. We wish you the best in finalizing and subsequently implementing the association’s 2025-8 strategic plan and thereby progress in achieving your vision and mission!