



Society of Gastroenterology Nurses and Associates, Inc.

**Strategic Plan 2018-2020**

## Introduction

The board of directors for the Society of Gastroenterology Nurses and Associates as well as several guests developed this strategic plan during a strategy session on February 12, 2017. The plan provides a roadmap through 2020 that creates focus in order to align SGNA's resources for maximum impact. The planning group reviewed and revised its previous strategic goal statements, agreeing on three goals that will have a significant impact on the future of the profession and the society. The group also identified short- and mid-term objectives to achieve those strategic goals and staff members filled in specific action items for each based on conversations during and after the strategy session.

## Strategic Plan Definitions

**Strategic Goals:** A broad outcome statement based on an opportunity or critical issue which requires SGNA's attention, focus and action. It must have significant and meaningful impact on our ability to realize our mission.

**Objectives:** A precise and measurable statement of what will be done to support the achievement of a strategic goal.

**Action Steps:** Specific tasks or projects critical to achieve the objectives and overall strategic goals.

## Future Planning Process

In order for SGNA to achieve its strategic goals and mission, the board of directors must work with staff to monitor progress towards achieving these objectives, and adjust the plan based on changes to the environment or barriers to success. A quarterly dashboard is recommended to monitor progress and an annual strategy session will be necessary to ensure the plan remains relevant.

## Vision of the Future of Gastroenterology Nurses and Associates

In preparation for the strategy session, the board and guests were asked to consider a blank slate scenario and provide their input on three questions designed to help them reimagine the profession for the future. During this discussion, "the profession" was understood to include nurses, nursing assistants, technicians and other non-physicians providing care to gastroenterology patients across all settings. The pre-work exercise shaped discussions during the strategy session that led to a collective vision of a desirable future state. Following are key points related to that vision:

- Diagnostic tools will change dramatically, becoming more ubiquitous, less invasive and more inherently intelligent, leveraging algorithms and big data sets to provide diagnoses and treatment options.
- Gastroenterology nurses will take on responsibility for administering many tests and procedures currently done by physicians.
- "Nurse Navigators" will be responsible for shepherding patients through their healthcare interactions ensure an appropriate flow of care and educating patients on screening opportunities, disease states/conditions and treatment options.

- Advancements in technology will enable nurses to know more about their patients in advance of procedures, interact with patients more frequently and in new ways (think video conferencing pre- and post-procedure), and be able to mine large data sets to identify behavioral and attitudinal information that will help in prevention and treatment of a variety of conditions.
- Nurses, associates and technicians will all need higher-level, more rigorous credentials and there was a strong preference for a uniform scope of practice across institutions and states.

Considering this vision and SGNA's strengths – ability to build effective educational programming; a strong, unbiased, singular voice for the profession; and relationships with key stakeholders and organizations – the planning group refined SGNA's strategic goals and identified objectives for each that will help move the organization and the profession toward this future vision. Those goals and objectives are outlined below.

[Note that a fourth area of opportunity was also identified, but not adopted as part of this current strategic plan due to the resource requirements of the adopted goals. Future planning groups may want to consider a future goal around similar to the following: *Influence the development of new technologies through our relationships with industry, the FDA and others.* Technology innovations as envisioned here included both procedural elements/tools as well as patient-interaction and data mining tools that would improve the patient experience. One part of this potential future goal might be to more fully develop the concept of a nurse/associate innovation incubator. This information is captured here for future discussion and consideration but is not considered part of the current strategic plan.]

## SGNA Goals, Objectives and Action Steps

### Goal #1: Membership

*SGNA will develop a compelling value proposition for gastroenterology technicians, ambulatory surgical center professionals, gastroenterology and hepatology nurses in all practice settings and purposefully market to these audiences.*

#### Objective 1.1

By December 31, 2018, SGNA will develop behavior-based segmentation for its membership (personas) in order to more effectively develop and promote resources for members with job roles that vary across a wide variety of settings.

##### Action Items:

- Develop unique personas for our constituency
- Identify needs for each persona
- Reorganize resources to fit personas
- Develop resources to fill gaps

#### Objective 1.2

By June 30, 2019, SGNA will develop and begin to implement a differentiated new member acquisition plan that uses personas to attract members across all sectors included in Goal #1.

##### Action Items:

- Create marketing plan and communication strategy focused on needs of personas
- Identify new pools of member prospects

- Establish prospect outreach plan

#### Objective 1.3

By December 31, 2018, SGNA will develop and provide to the regions a toolkit of resources to assist them in driving membership retention through increased engagement and education in a box, which initiatives will incorporate a role for retired members.

##### Action Items:

- Update existing toolkit materials
- Create new toolkit(s) to support educational needs
- Create new resources focused on retired members
- Develop platform for regional leaders to connect
- Redefine regional leader expectations to support engagement and education

#### Objective 1.4

By December 31, 2019, SGNA will create a resource depository for nurses and other members to use of patient educational resources that increase patient involvement in the diagnostic and treatment process with the end goal of promoting more informed self-care.

##### Action Items:

- Identify and prioritize patient educational material subject areas
- Conduct audit/collection of patient education materials
- Create hub for patient educational materials
- Identify gaps of patient education materials
- Investigate opportunities to develop new patient education materials (may include partnerships or creation of new materials by SGNA)

## Goal #2: Quality Care

*SGNA will drive the quality of care in all areas of gastroenterology practice for nurses and associates.*

#### Objective 2.1

By December 31, 2018, SGNA will develop educational resources on quality measure best practices.

##### Action items:

- Convene task force to develop needs assessment survey to establish gaps in knowledge related to quality measures (Benchmarking task force, Healthcare quality advisory group)
- Assess for membership gaps in knowledge related to quality measures
- Develop educational resources based on findings from needs assessment survey

#### Objective 2.2

By December 31, 2020, SGNA will establish valid and reliable quality measures for infection prevention, patient safety and disease management, safe staffing models for all GI settings.

##### Action items:

- Assemble task forces dedicated to each area to determine respective quality measures
- Inclusion in the GIQuIC national registry for measurement

#### Objective 2.3

By December 31, 2019, SGNA will establish a quality leader program to encourage adoption of quality measure best practices.

##### Action items:

- Establish task force to develop criteria for Quality Leader program
- Solicit volunteers for Quality Leader program
- Market SGNA Quality Leader program

#### Objective 2.4

By June 1, 2018, SGNA will establish a long term plan to assure the role of nursing in quality for gastroenterology care, to include dissemination of information, acquiring a seat at the table in all relevant professional forums related to quality in GI, and becoming a trusted advisor to all relevant parties, including regulatory and governmental bodies impacting related rules and regulations.

##### Action items:

- Convene task force to
  - determine purpose and goals for long term plan
  - select key organizations poised to help meet our goals
- Reach out to selected organizations to disseminate information

### Goal #3: Future of Nursing

*SGNA will advance the roles of nurses and associates within gastroenterology in support of the Institute of Medicine's Future of Nursing recommendations.*

#### Objective 3.1

By December 31, 2019, SGNA will develop and update role descriptions for the following gastroenterology roles: Nurse Navigator, Screener, Advanced Practice Nurse, Registered Nurse, Licensed Practical Nurse, Nursing Assistive Personnel (NAP)

##### Action items:

- Develop task force to determine role specific descriptions for each new role listed
- Create position statements outlining the new role descriptions
- Update current position statement role descriptions (currently known as role delineation)

#### Objective 3.2

By December 31, 2020, SGNA will be in advanced development of a clear scope of practice for those in our profession by partnering with key stakeholders to define each roles scope.

##### Action items:

- Develop key milestones for creation and development of scope of practice
- Convene task force to define scope of practice, include key stakeholders

### Objective 3.3

By December 31, 2020 SGNA will create two advanced education modules that support specialization in key therapeutic areas.

#### Action items:

- Convene task force and conduct needs assessment to determine key therapeutic areas
- Solicit SMEs to develop educational online module resources
- Prepare a self-assessment for module users to test pre/post knowledge on therapeutic area

### Objective 3.4

SGNA will determine its health policy and actively work to strengthen this policy through grass roots and national relationships.

#### Action items:

- Determine health policy agenda
- Create toolkit that includes talking points on key issues
- Enable members to effectively speak on behalf of the organization at the local/chapter level
- Proactively prepare all representatives to ensure the right person is engaged at the right time