

**Innovate, Engage, Transform: Society of Participatory Medicine's (SPM)**

**Strategic Vision for the Future**

HINF 6215: Project Management

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**Society for  
Participatory  
Medicine**

Transforming the Culture of Patient Care

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**BACKGROUND:**

The Society for Participatory Medicine (SPM) stands at the intersection of healthcare innovation and patient empowerment, championing the ideals of collaborative decision-making, patient engagement, and shared responsibility in healthcare delivery. Since its inception, SPM has been a beacon of change, advocating for a paradigm shift in the traditional patient-provider dynamic towards a more equitable partnership.

However, the healthcare landscape is rapidly evolving. With advancements in technology, changing patient expectations, and new care delivery models, SPM recognizes the need to adapt to stay relevant and impactful. In response, SPM's Board of Directors has launched a transformative initiative. This initiative aims to redefine SPM's mission and vision, demonstrate its mission through pilot projects, and enhance outreach efforts to attract more members and sponsors.

**GOAL & OBJECTIVE:****Goals:****1. Strategic Redefinition:**

Create a thorough plan to update SPM's goals and objectives for sustainability and relevance in the healthcare sector ten to fifteen years from now.

**2. Resource Optimization:** Determine and efficiently use volunteer and financial resources to assist in carrying out the revised purpose and vision.

**3. Awareness & Marketing Improvement:** Set plans into action to raise knowledge of SPM's objective and boost participation via successful marketing efforts.

**4. Benefit Package Development:** Provide a detailed list of privileges for SPM members, such as networking events, access to exclusive material, and educational opportunities.

**5. Communication Plan Implementation:** Establish a thorough communication strategy to ensure accountability and transparency by giving sponsors and project team members regular progress updates.

**6. Agreement & Buy - in:** Obtain approval and backing for the revised SPM mission and vision from all relevant parties, including sponsors, team members, and other important stakeholders.

**7. Educational Programs:** To empower healthcare executives and members, create training programs like CLEs, certifications, and mentorship opportunities.

**8. Stakeholder engagement:** By encouraging teamwork amongst members, sponsors, and partners and streamlining communications, you may raise stakeholder involvement.

### **Objective:**

To ensure sustainability and stakeholder participation by redefining the Society for Participatory Medicine's (SPM) mission and vision in line with the changing healthcare landscape.

### **STRATEGIES:**

The Society of Participatory Medicine (SPM) is embarking on a strategic vision for the future, which involves a comprehensive plan to innovate, engage, and transform. The plan is divided into six main stages: Project Plan/Project Initiation, Research, Stakeholder Engagement,

Mission & Vision Redefinition, Promotion, and Advocacy/Awareness. Each stage is crucial for building relationships, gaining support, and ensuring that the project is aligned with the needs and goals of all stakeholders. The plan is designed to promote SPM and its mission, and to make a positive impact in the field of participatory medicine and patient engagement.

### **Project Plan/ Project Initiation:**

The first stage involves reviewing the charter, confirming, and defining objectives, and identifying stakeholders. This sets the foundation for the entire project and ensures that everyone is on the same page.

### **Research:**

- The second stage involves conducting extensive research to understand the current landscape of participatory medicine, patient engagement, and other related fields. This includes reviewing all previous work and feedback, comparing, and studying other organisations, identifying voids in the available information, and adding new insights with the help of feedback.
- Based on this research, a questionnaire is developed for identified stakeholders, which is then pilot tested, refined, and finalised. The questionnaire is then used to conduct interviews with stakeholders, and the data collected is analysed to identify gaps and voids.
- The contact person of SPM is also interviewed to understand their existing mission, and the key goals of the company and their aspirations for the future (short term & long term) are assessed. The trends in participatory medicine, patient engagement, etc. are also assessed, and the members of Society of Participatory Medicine are surveyed to give their opinion and preferences on some key recommendations. Based on this research, a new elevator pitch that reflects SPM's vision is prepared.

### **Stakeholder Engagement:**

The third stage involves identifying key stakeholders and engaging with them. This is crucial for building relationships, gaining support, and ensuring that the project is aligned with the needs and goals of all stakeholders.

### **Redefining the Mission & Vision:**

The fourth stage involves redefining the mission and vision of SPM based on the research and stakeholder engagement. This ensures that the mission and vision are relevant, up-to-date, and aligned with the current landscape of participatory medicine and patient engagement.

### **Promotion:**

- The fifth stage involves promoting SPM and its mission. This includes identifying key sponsors, planning, and organizing events, designing promotional materials, inviting stakeholders, and collecting feedback. The events are planned with the target audience's accessibility, capacity, and relevancy in mind, and the schedule includes seminars, panel discussions, and networking breaks.
- The promotional materials are eye-catching and highlight the event's salient features, and the invites are customized to emphasize the event's value proposition. Rewards or advantages are considered for participation, professional development credits, or networking chances, and colleges are worked with to promote student attendance.
- After the event, surveys or post-event evaluations are conducted to get input from the attendees on how they felt about the event and what may have been done better. The comments received are examined to determine how the event might be improved in the future, and potential people who can partner with us or provide sponsorship.

### **Advocacy/ Awareness:**

The sixth and final stage involves spreading awareness about SPM and its mission and advocating for participatory medicine and patient engagement. This is crucial for building support, gaining recognition, and making a positive impact in the field of participatory medicine and patient engagement.

### **SCOPE:**

#### *Mission and Vision Redefinition:*

- The primary goal is to reformulate SPM's mission and vision to better meet the increasing requirements of patients, caregivers, and healthcare professionals.
- This entails evaluating the current mission and vision, identifying areas for improvement, and proposing revised statements that align with the organization's aims and values.
- *Stakeholder Engagement Optimization:*
- Improving stakeholder involvement is critical for increasing resources and guaranteeing active participation in meeting SPM objectives.
- This involves developing strategies to increase financial support, volunteerism, and collaboration among stakeholders.
- *Awareness and Marketing Initiatives:*
- Improving awareness and marketing activities is critical to growing membership and gaining support for SPM's initiatives.
- This includes creating communication strategies, promotional materials, and events that effectively promote the organization's aims.

### **ASSESSMENT:**

The assessment phase will involve the following activities:



- Reviewing previous work and incorporating insights gained from stakeholder engagement efforts.
- Analyzing existing data to identify gaps or voids in SPM's current approach.
- Prioritizing stakeholders according to their importance and impact.

#### **OUT OF SCOPE:**

- *Operational Changes:*

The project does not entail significant operational changes within SPM, such as structural reorganization or changes to day-to-day operations.

- *Long-Term Implementation:*

The actual implementation and sustainability of initiatives beyond the project timeline may require ongoing efforts and resources beyond the project's scope.

- *External Factors:*

External factors such as changes in regulatory policies, market dynamics, or technological advancements are beyond the project's control and may impact the implementation of certain initiatives.

#### **DELIVERABLES:**

- *Project Plan Document:*

A comprehensive document outlining strategies, timelines, resources, and responsibilities for executing the project successfully.

- *Stakeholder Questionnaire:*

Development of a questionnaire to gather insights from stakeholders regarding their perceptions, needs, and expectations from SPM.

- *Gap Analysis Report:*

Analysis of data collected from stakeholder interviews and assessment activities to identify gaps and areas for improvement within SPM's current mission and vision.

- *Revised Elevator Pitch:*

Development of a compelling elevator pitch that effectively communicates SPM's revised mission and vision to stakeholders and potential collaborators.

- *Sponsored Event/Conference Plan:*

Planning and execution of an event or conference aimed at creating awareness and engagement within the healthcare industry towards SPM's goals.

- *Annual Calendar of Activities:*

Preparation of a yearly calendar outlining specific events, initiatives, and activities planned by SPM to address critical healthcare topics and engage stakeholders.

- *Membership Benefits Package:*

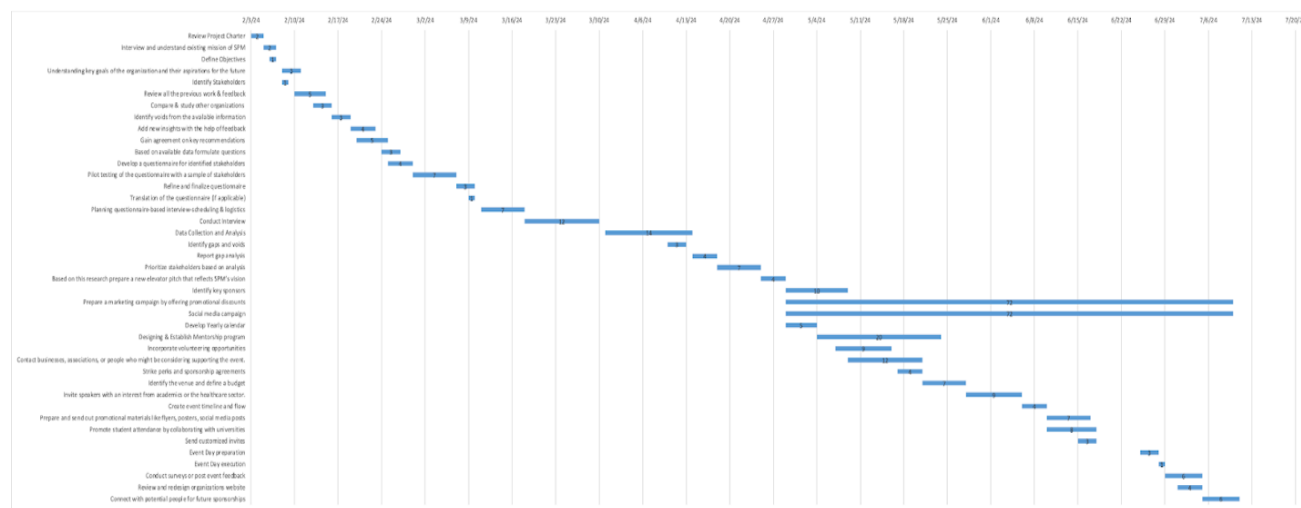
Framing a list of benefits to incentivize membership and attract new members to SPM. This includes access to exclusive content, CLE sessions, certifications, mentorship opportunities, volunteering opportunities, and discounts on events and organizational partnerships.

## **BUDGET:**

While no budget is currently allocated for the project, funding opportunities will be explored to support the implementation of the project plan. Strategies for securing financial support will include seeking sponsorships, grants, donations, and partnerships with relevant organizations. The budget will be developed in parallel with the project plan, with a focus on optimizing resources to achieve the desired outcomes within the allocated timeframe.

**TIMELINE:**

	Activity	Start Date	Duration	Dependency
1	Review Project Charter	2/3/24	2	null
2	Interview and understand existing mission of SPM	2/5/24	2	2
3	Define Objectives	2/6/24	1	3
4	Understanding key goals of the organization and their aspirations for the future	2/8/24	3	4
5	Identify Stakeholders	2/8/24	1	4
6	Review all the previous work & feedback	2/10/24	5	5,6
7	Compare & study other organizations	2/13/24	3	7
8	Identify voids from the available information	2/16/24	3	8
9	Add new insights with the help of feedback	2/19/24	4	9
10	Gain agreement on key recommendations	2/20/24	5	10
11	Based on available data formulate questions	2/24/24	3	11
12	Develop a questionnaire for identified stakeholders	2/25/24	4	12
13	Pilot testing of the questionnaire with a sample of stakeholders	2/29/24	7	13
14	Refine and finalize questionnaire	3/7/24	3	14
15	Translation of the questionnaire (if applicable)	3/9/24	1	15
16	Planning questionnaire-based interview-scheduling & logistics	3/11/24	7	16
17	Conduct Interview	3/18/24	12	17
18	Data Collection and Analysis	3/31/24	14	18
19	Identify gaps and voids	4/10/24	3	19
20	Report gap analysis	4/14/24	4	20
21	Prioritize stakeholders based on analysis	4/18/24	7	21
22	Based on this research prepare a new elevator pitch that reflects SPM's vision	4/25/24	4	22
23	Identify key sponsors	4/29/24	10	23
24	Prepare a marketing campaign by offering promotional discounts	4/29/24	72	23
25	Social media campaign	4/29/24	72	23
26	Develop Yearly calendar	4/29/24	5	23
27	Designing & Establish Mentorship program	5/4/24	20	24,25,26,27
28	Incorporate volunteering opportunities	5/7/24	9	28
29	Contact businesses, associations, or people who might be considering supporting the event.	5/9/24	12	29
30	Strike perks and sponsorship agreements	5/17/24	4	30
31	Identify the venue and define a budget	5/21/24	7	31
32	Invite speakers with an interest from academics or the healthcare sector.	5/28/24	9	32
33	Create event timeline and flow	6/6/24	4	33
34	Prepare and send out promotional materials like flyers, posters, social media posts	6/10/24	7	34
35	Promote student attendance by collaborating with universities	6/10/24	8	34
36	Send customized invites	6/15/24	3	35,36
37	Event Day preparation	6/25/24	3	37
38	Event Day execution	6/28/24	1	38
39	Conduct surveys or post event feedback	6/29/24	6	39
40	Review and redesign organizations website	7/1/24	4	40
41	Connect with potential people for future sponsorships	7/5/24	6	41



## **RESOURCES, ROLES AND RESPONSIBILITIES:**

### **Resources:**

#### **1. Project Leader:**

- Jay Spitulnik: As the project leader, Jay Spitulnik will oversee the overall execution of the project, provide guidance to the team, and ensure alignment with the project objectives.

#### **2. Project Manager:**

- Nachiket Thakkar: As the project manager, he will be responsible for coordinating the project activities, managing timelines, resources, and communication among team members and stakeholders.

#### **3. Team Members:**

- Kaustubh Pachpande, Riddhi Jain, Vaibhavi Mudunuru, Keerthana Kesavalu Krishnamurthy, Vishruti Savaj, Niharika Tiwari: These team members will be actively involved in various project tasks such as reviewing past work, conducting stakeholder interviews, analyzing data, designing marketing campaigns, planning events, and executing the project plan.

#### **4. Sponsor:**

- Mary Hennings, Dr. Danny Sands: As sponsors, Mary Hennings and Dr. Danny Sands will provide financial support, guidance, and endorsement for the project's objectives and activities.

#### **5. Other Stakeholders:**

- Other stakeholders involved in the project may include members of the healthcare industry, donors, volunteers, and participants in events or campaigns organized by the project team.

#### **6. External Resources:**

- External resources such as consultants, vendors, or partners may be engaged as needed for specialized expertise, event planning, marketing services, or technical support.

### **Roles and responsibilities:**

#### Project Leader and Manager:

- Provide guidance, oversight, and support to the project team.
- Ensure that all activities are aligned with the project's objectives, timelines, and deliverables.
- Facilitate communication among sponsors, stakeholders, and team members.
- Monitor project progress, identify potential risks, and implement mitigation strategies as needed.

#### Team Members:

- Actively engage in project tasks and activities as assigned.
- Collaborate closely with team members to achieve project goals.
- Offer valuable insights, ideas, and expertise to enhance project outcomes.
- Adhere to project timelines, quality standards, and guidelines.

#### Sponsor:

- Provide financial backing, resources, and guidance to support project activities.
- Advocate for the project within their organization or community.
- Review and approve project plans, budgets, and major decisions.

### **ASSUMPTIONS:**

1. Stakeholder Availability: It is assumed that stakeholders will be available for interviews and engagement activities as per the scheduled timelines.
2. Data Accuracy: It is assumed that the data collected from stakeholders and research activities will be accurate and reliable.

3. Resource Availability: It is assumed that the necessary resources, including personnel, finances, and equipment, will be available to execute the project plan effectively.
4. Stakeholder Cooperation: It is assumed that stakeholders will cooperate and actively participate in project activities, including surveys, interviews, and feedback sessions.
5. Sponsor Commitment: It is assumed that sponsors will fulfill their commitments and provide the necessary financial support as agreed upon.
6. Timely Execution: It is assumed that project activities will be completed within the specified timelines to ensure smooth progress and achievement of project objectives.
7. Stakeholder Engagement: It is assumed that stakeholders will engage positively with the project's mission and vision redefinition efforts, promoting awareness and support for the Society of Participatory Medicine.
8. Event Attendance: It is assumed that targeted stakeholders will attend planned events, workshops, and seminars, contributing to increased awareness and engagement with the Society's goals.
9. Stakeholder Prioritization: It is assumed that the prioritization of stakeholders will be based on accurate data analysis, ensuring that key stakeholders receive appropriate attention and engagement efforts.
10. Successful Marketing Campaigns: It is assumed that marketing campaigns targeting future healthcare leaders will effectively attract participants and promote SPM's initiatives, resulting in increased engagement and support.

**RISK MANAGEMENT:**

Monitoring risks is the process of adhering to the risk response plan of tracking identified risks, identifying new risks, monitoring residual risks, and evaluating the effectiveness of the risk response process throughout the project. On some projects, the majority of risk events that materialize are ones that the project.

1. Identify Risks: Conduct a thorough risk assessment to identify potential threats such as lack of stakeholder buy-in, financial constraints, and resource limitations.
2. Assess Risks: Evaluate the likelihood and impact of each identified risk to prioritize mitigation efforts.
3. Mitigate Risks: Develop strategies to mitigate risks, such as securing additional funding sources, recruiting more volunteers, and enhancing stakeholder engagement through targeted communication efforts.
4. Monitor Risks: Regularly monitor the project's progress and reassess risks to adapt mitigation strategies as needed.

The following are potential risks that can arise during the project execution:

1. Financial and resource constraints

Risk: Limited financial and volunteer resources may hinder project implementation

Mitigation: Regularly monitor budget and resource allocation. Seek additional funding through grants or partnerships. Optimize stakeholder engagement to attract more volunteers.

Contingency: Develop alternative fundraising strategies and contingency plans for resource shortages.

2. Lack of Stakeholder Engagement:

Risk: Inadequate stakeholder engagement may lead to misalignment of project goals and stakeholder expectations.

Mitigation: Develop a comprehensive stakeholder engagement plan, including regular communication, feedback mechanisms, and involvement in decision-making processes.

Contingency: Adjust project plans based on stakeholder feedback and address any concerns promptly to maintain stakeholder support.

3. Awareness and Marketing Challenges:

Risk: Insufficient awareness and marketing efforts may limit project visibility and impact.

Mitigation: Develop a robust marketing and communication strategy to raise awareness about the project goals and outcomes. Utilize multiple channels such as social media, workshops, and promotional materials.

Contingency: Monitor the effectiveness of marketing efforts and adjust strategies as needed to reach target audiences effectively

### **COMMUNICATION PLAN:**

Communications plan includes discussing all the work around the project including starting with planning for it, generating it, organizing and sharing it and finally, storing and disposing of it with the team and the project sponsors. This includes determining project information needs and establishing an information system and while the project is under way, the project manager and team need to determine any additional information needs that were not already uncovered, collect information on executed work and work in progress, and then report progress to all stakeholders.

The following is a communication plan for the project:

- Status reports will be provided bi-weekly by Nachiket Thakkar and Jay Spitulnik to sponsors and all project team members.
- Communication channels include email updates, virtual meetings, and collaborative project management platforms.
- Status reports will include updates on project progress, milestones achieved, upcoming tasks, and any identified risks or issues.
- Reports will be concise, yet comprehensive, providing stakeholders with a clear understanding of project status and next steps.



- Encourage active participation and feedback from all stakeholders to ensure transparency and alignment with project goals.
- Foster an open communication culture that promotes collaboration, innovation, and continuous improvement.
- Establish protocols for addressing conflicts or discrepancies in project communication promptly and professionally.
- Encourage respectful dialogue and seek consensus-driven solutions to resolve conflicts and maintain project momentum

## **STAKEHOLDERS**

Each stakeholder plays a crucial role in contributing to the project's success, from providing resources and expertise to shaping project direction and outcomes. Effective collaboration and engagement with these stakeholders are essential for achieving project objectives and maximizing impact within the healthcare space.

## **IDENTIFYING STAKEHOLDERS**

1. Project Leaders:
2. Sponsor:
3. Project Manager:
4. Team Members:
5. Contact Person of SPM
6. Members of Society of Participatory Medicine
7. Invited Speakers
8. Businesses/Associations
9. Prospective Guests/Attendees

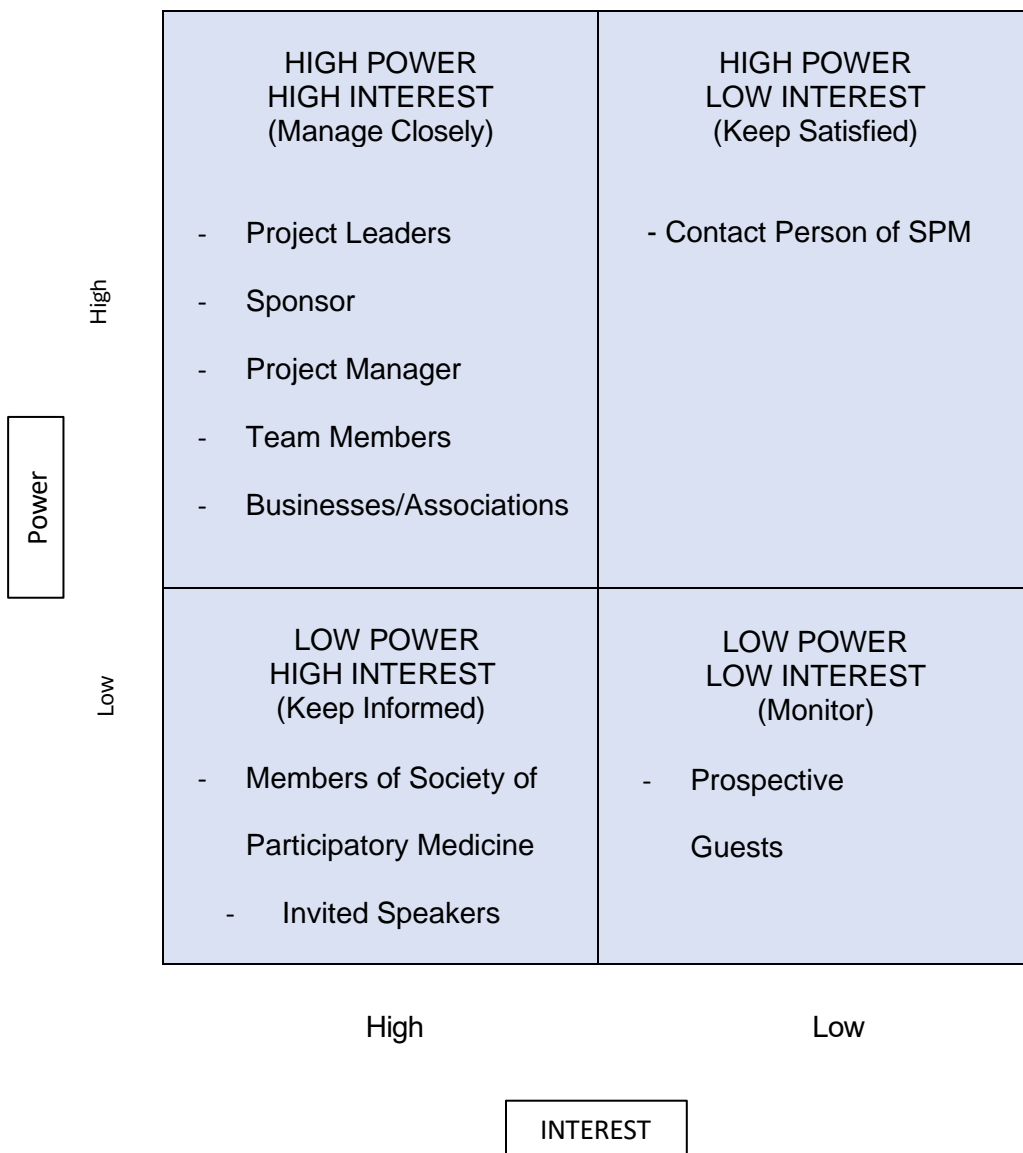
**STAKEHOLDER MANAGEMENT:**

This involves identifying and engaging various stakeholders, including project leaders, sponsors, team members, members of SPM, speakers, businesses, and attendees. Through regular communication, updates, and feedback mechanisms, stakeholders are kept informed and involved throughout the project lifecycle. By understanding their needs, expectations, and concerns, project leaders ensure clear communication channels and address any conflicts or issues promptly. Additionally, managing expectations by setting realistic timelines and outcomes is crucial for maintaining transparency and trust. Flexibility is maintained to adapt to changing stakeholder needs, and feedback is actively sought to ensure alignment and satisfaction. Effective stakeholder management is vital in achieving the project's objectives of redefining SPM's mission and vision, increasing awareness, and fostering sustainable engagement within the healthcare space.

**STAKEHOLDER ENGAGEMENT:**

Ensuring ongoing stakeholder engagement is paramount for the success of the "Innovate, Engage, Transform SPM's Strategic Vision for the Future" project. While stakeholder commitment is crucial, maintaining their active involvement throughout the project is equally vital. The project team must proactively monitor stakeholder dynamics, promptly addressing any shifts in needs, expectations, or concerns. By staying attuned to stakeholders' evolving requirements, the team can adapt project strategies and deliverables, accordingly, thereby ensuring continued alignment and support. This ongoing engagement strategy will facilitate a collaborative environment, fostering sustained enthusiasm and commitment among stakeholders.

## POWER- INTEREST MATRIX

**MILESTONES:**

1. Project Plan Initiation: 2/3/24
2. Research: 4/14/24
3. Stakeholder Engagement: 4/18/24
4. Designing Mentorship Program: 5/4/24

5. Event Planning: 5/9/24
6. Designing Flyers: 6/10/24
7. Inviting Stakeholders: 6/15/24
8. Event Day: 6/28/24
9. Collecting Feedback: 6/29/24
10. Redesign Organization: 7/1/24
11. Connect with potential future Stakeholders: 7/5/24

### **CHANGE MANAGEMENT:**

Change management plays a significant role in our project, "Innovate, Engage, Transform: SPM's Strategic Vision for Future," particularly because it involves redefining the mission and vision of the Society for Participatory Medicine (SPM). Some of the possible changes and strategies to manage them effectively are listed below:

- **Project Plan / Project Initiation:**

Reviewing the charter and confirming/defining objectives ensures alignment with the desired changes in the mission and vision of the Society.

Identifying stakeholders is crucial for understanding who will be impacted by the changes and ensuring their involvement and support throughout the project.

- **Research:**

Reviewing previous work and feedback helps in understanding past challenges and areas for improvement, a critical aspect of change management.

Studying other organizations provides insights into successful strategies for implementing similar changes.

Identifying voids and formulating questions for stakeholders aligns with the change management process of understanding stakeholder needs.

- Stakeholder Engagement:

Pilot testing the questionnaire with stakeholders and refining it based on feedback is essential for ensuring that stakeholder perspectives are considered in the change process.

Conducting interviews, analyzing data, and identifying gaps help in understanding stakeholder concerns and expectations, which are crucial for successful change implementation.

- Mission & Vision Redefinition:

Interviewing the contact person of SPM and surveying members help in understanding existing perceptions and expectations regarding the mission and vision, which is vital for redefining them effectively.

Creating a new elevator pitch that reflects the updated vision aligns with the communication aspect of change management, ensuring stakeholders understand and support the proposed changes.

- Promotion:

Identifying key sponsors and engaging stakeholders aligns with the change management strategy of gaining support and buy-in from influential stakeholders.

Designing promotional materials and inviting stakeholders aim to create awareness and engagement around the proposed changes, essential for successful implementation.

- Advocacy / Awareness Methodologies:

Developing a yearly calendar and designing a mentorship program align with the change management strategy of sustaining and institutionalizing the changes over time.

Incorporating volunteering opportunities and targeting future healthcare leaders through marketing campaigns and social media help in building a culture that supports the new mission and vision.

Overall, each phase of our project involves activities that are closely tied to change management principles, highlighting the importance of managing change effectively for the successful redefinition of SPM's mission and vision.