



# 2024-2027 Strategic Plan

**Prepared by Leading Associations**

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# Executive Summary

Based on board interviews and survey responses, clear themes emerged regarding the future direction of the organization. These themes led to the establishment of Key Strategic Focus Areas.

## **Strategic Focus Areas**

After deliberation, the leadership team established the following key areas of strategic focus:

- 1. Enhance Financial Security:**  
Establish and execute a comprehensive financial management plan, including a balanced budget, identifying and leveraging sustainable income streams, and developing a sound investment plan.
- 2. Membership Growth and Value:**  
Foster a multidisciplinary member base and enhance membership value.
- 3. Shape the Future of Hearing Loss Prevention:**  
Shape the future of hearing loss prevention through expertise, collaboration, and best practices.

# Overview

The National Hearing Conservation Association (NHCA) Board, key leaders and staff leadership met at the Civica Office in Aurora, Colorado on June 26-27, 2024, to develop the 2024-2027 NHCA Strategic Plan. Jeffrey Arnold, MAM, CAE and Robert Spangler, MPA, CSC of Leading Associations were engaged to lead the planning process.

<b>Board, Other NCHA Leadership</b>	
Elizabeth Masterson, President Sridhar Krishnamurti, President-Elect Rachel Bouserhal, Immediate Past President Jim Schultz, Secretary/Treasurer Andy Merkley, Director of Education Sharon Sandridge, Director of Membership Michael Murphy, Director of Marketing and PR Jesse Norris, Director of Commercial Partnerships Devon Kulinski, Director of Communication	Valerie Pavlovich Ruff, Member-at-Large Frank Wartinger, Member-at-Large Laurie Wells, Leadership Advisory Team Jennifer Tufts, Leadership Advisory Team Amy Blank, Program Chair  Margorie Grantham, Spectrum Chief Editor Theresa Schulz, Fit-Testing Task Force Co-Chair  Ashley Montoya, Executive Director

## Facilitation Schedule

### Wednesday

- Introductions / Group Agreements
- Guiding principles
- Strategic lens
- Background work
- Strategic considerations, prioritization
- Develop draft goals, timelines, and accountability

### Thursday morning

- Clean up objectives, timelines, and accountability
- Create guidelines for execution
- Assign accountability

# Strategic Lens

Every organization has a lens through which it views strategic decision-making. The National Hearing Conservation Association’s Vision and Mission serve as the organization’s strategic lens.

## Vision/Mission Review

The NHCA Vision and Mission were reviewed and reaffirmed.

### Vision Statement:

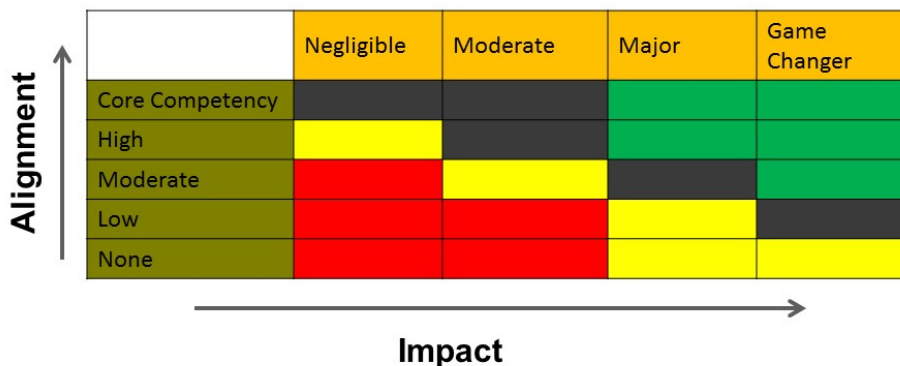
*To prevent hearing loss and other auditory disorders due to noise and secondary environmental factors in all sectors of society.*

### Mission Statement:

*NHCA provides leadership, expertise, and education on hearing loss prevention strategies and services to the broader professional community and empowers and supports members through networking and advocacy.*

Another viewpoint the group was asked to consider focused on identifying items that have the greatest alignment with, and will have the greatest impact on, stakeholder value for resources invested. Alignment can be with your mission, your strategic priorities and whether you are the organization best positioned to address the issue.

The organization should focus its efforts in the upper right quadrant of the graph – or the “game changers” that are best aligned and most impactful.



# Strategic Goals

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## **Goal # 1 Enhance Financial Security:**

*Establish and execute a comprehensive financial management plan, including a balanced budget, identifying and leveraging sustainable income streams, and developing a sound investment plan.*

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### **Key objectives/Milestones**

**1. Develop and operate within an annual balanced budget**

**Owner:** Secretary/Treasurer, staff develop budget and EC approves the budget  
**Timeframe:** Budget annually in May, approved in June and adjusted during the year as appropriate

**2. Develop a reserve funds policy to include appropriate contributions and investment strategy**

**Owner:** Secretary/Treasurer, Finance Committee (to be created), staff  
**Timeframe:** By next EC meeting – November 2024

**3. Maintain and grow sponsorships**

**Owner:** Director of Commercial Partnerships, Executive Director  
**Timeframe:** Forecast in June 2024, recruit July to November, finalize in January, then ongoing annually

**4. Identify, prioritize and launch additional and/or enhance income streams with a revenue target determined in the budget**

**Owner:** EC Directors (Education, PR, Membership, Sponsorship, Trio) with review by Secretary/Treasurer and staff, and EC approval  
**Timeframe:** Identify initiatives throughout the year and incorporate initiatives into 2025 budget, ongoing annually afterward

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**Goal # 2 Membership Growth and Value:**

*Foster a multidisciplinary member base and enhance membership value.*

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**Key objectives/Milestones**

- 1. Seek feedback on NHCA value and benefits to members and initiate action items to enhance identified values and benefits**  
**Owner:** Director of Membership, Director of Education, staff  
**Timeframe:** Report plan to EC February 2025; Implement accordingly
  
- 2. Increase membership by 10% annually**  
**Owner:** Director of Membership  
**Timeframe:** Include annually in budget (May/June)
  
- 3. Develop and implement educational and other opportunities to attract nonmembers**  
**Owner:** Director of Education and Director of Membership  
**Timeframe:** Standing item in committee meetings; include in Annual Report
  
- 4. Increase awareness of NHCA with other professional organizations, industry and academia, and develop appropriate partnerships**  
**Owner:** Task Force (to be created) with directors such as Membership, Education, PR President/Trio will establish Task Force  
**Timeframe:** Task Force launch by March 2025; Task Force reports back by Summer 2025
  
- 5. Development of mentorship program for students, young professionals or those who are new to the area of hearing loss prevention**  
**Owner:** Directors of Membership and Education  
**Timeframe:** Launch in Q3 and Q4 2025

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**Goal # 3 Shape the Future of Hearing Loss Prevention:**

*Shape the future of hearing loss prevention through expertise, collaboration, and best practices.*

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**Key objectives/Milestones****1. Promote implementation of best practices in hearing loss prevention**

**Owner:** Directors of Communications, PR and Education

**Timeframe:** Immediately after development of a best practice

**2. Drive and update standards and influence regulations to prevent hearing loss and other auditory disorders due to noise and secondary factors in all sectors of society**

**Owner:** Trio ensures representation on standard setting committees and creates task forces

**Timeframe:** Identify opportunities on ongoing basis

**3. Expanding reach and influence by collaborating with like-minded organizations to achieve common goals**

**Owner:** Director Commercial Partnerships and to be created partnership task force

**Timeframe:** Establish task force by March 2025

Task Force to review partnership by end of 2025

**4. Create and curate a hearing loss prevention resource repository to improve accessibility of information and tools**

**Owner:** Director of Communication

**Timeframe:** Launch as directed based on website development

**5. Develop position statements.**

**Owner:** Director of Education, Director of Communication, Trio

**Timeframe:** Included in director annual plans, and as opportunities arise with Trio



## NOTES AND CLARIFICATIONS

### Goal #1 Enhance Financial Security

- 1.4 - Fall Virtual Educational Summit launched as new income stream

### Goal #2 Membership Growth and Value

- 2.3 - Track non-member participation, how many convert to membership; how are we developing opportunities specifically for attracting new audiences
- 2.5 - Some movement on this objective already

### Goal #3 Shape the Future of Hearing Loss Prevention:

- 3.3 - Keep track of number of task forces being launched/overlap. Here are the new committees/task forces created in the Strategic Plan:

(Goal 1.2) **Finance Committee**

(Goal 2.4) **Awareness Task Force** with directors such as Membership, Education, PR – Purpose: Increase awareness of NHCA with other professional organizations, industry and academia, and develop appropriate partnerships

(Goal 3.3) **Partnerships task force** – Purpose: Expanding reach and influence by collaborating with like-minded organizations to achieve common goals

- 3.4 - This is a public resource vs. members only. The objective is not contingent on a new website being developed. Key point – we’re not necessarily creating new materials but providing access to existing resources.

## Next Steps

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It is important that the organization keep this effort alive and moving. Ensure that the goals are validated by the Board and that they **are included at the top of each Board Meeting Agenda and integrated into a Strategic Planning Pacing Calendar.**

Strategic conversation isn't just for retreats. Strategic conversation should be ongoing. Strategy making is a process, not an event. The team should continue to tell the story (that is, WHICH path we choose and WHY), and evaluate team member mindset and attitudes regarding the strategic focus areas.

### How We Hold Each Other Accountable:

- Pass knowledge to new EC members – add to P&P
- Use Strategic Plan objectives as a volunteer recruiting tool
- Communicate the vision and enthusiasm of the Strategic Plan – short video clips
- Develop a volunteer management plan
- Add Strategic Plan assignments to director job descriptions
- Make room to adjust
- Include students on Task Forces

### Parking Lot Items to Address

Some key items were placed in the “Parking Lot” to be addressed. These include:

- *Spectrum* – explore different approach? Reassess Community Forum

# Background Work

## Ideal NHCA in 5 Years

- **Engaging Conferences:** Maintaining an awesome, welcoming, and engaging conference atmosphere, with increased membership, especially among younger people.
- **Financial Strength:** Achieving a strong financial position that adds value to members and makes the organization synonymous with noise and hearing conservation.
- **Innovation and Impact:** Leading the adoption of hearing protector fit testing in the occupational community and promoting innovation in the field of hearing conservation.
- **Visibility and Diversity:** Becoming more visible in related fields, diversifying membership across hearing health professionals, and offering more exhaustive public media output.
- **Educational and Professional Opportunities:** Providing higher value to membership through educational and professional opportunities.
- **Global Relevance:** Becoming a financially stable and globally relevant organization, recognized by health and safety professionals worldwide.
- **Resource Availability:** Offering resources to professionals, educators, and consumers for hearing loss prevention and conservation.
- **Membership and Sponsorship Growth:** Growing to 500-600 members and 15-20 sponsors, with strong ties to other organizations and more position statements available to the public.

## Top Strategic Concerns identified:

1. Establish Financial Resilience
2. Grow Membership
3. Support and promote innovation/position NHCA as a leader in public information

## Previous Plan Assessment

The 2020-2023 Strategic Plan goals and objectives were reviewed to identify key accomplishments, unfinished or in-progress work. Each goal was evaluated to determine whether it should be Preserved, Improved or Eliminated (P.I.E. Analysis).

<p><b>Goal 1: Broaden Member Value</b>  <i>Create and implement a plan to increase member value beyond the in-person conference.</i></p> <p><u>Key objectives</u></p> <ul style="list-style-type: none"> <li>• Develop a Young Professionals Committee – <u>maybe innovate</u></li> <li>• Develop a process to engage PSP members to gather input</li> <li>• Develop a process to engage Commercial Members to gather input</li> <li>• Develop a plan beyond 2021 for Webinars - <u>operationalized</u></li> </ul>	
<p><b>Key Accomplishments</b></p>	<p><b>Incomplete Initiatives</b></p>
<ul style="list-style-type: none"> <li>• Young Professionals launched and no longer active. TBD if COVID impacted start and stop.</li> <li>• Webinar program is operational and successful</li> <li>• Engaged commercial members – still need iteration</li> <li>• Added retirement category</li> <li>• E-news, Spectrum improved and increased readership</li> </ul>	<ul style="list-style-type: none"> <li>• Young Professionals initiative</li> <li>• PSP – retitle to Hearing Conservation Providers – retain current (42) and attract more – tough nut to crack. -CAOHC partnership opportunity – membership, branding, employer companies, conference content, business operations, paper presentations, Day-in-the-Life of...</li> <li>• Member survey</li> </ul>
<p><b>Preserve/Improve/Eliminate?</b>  <b>Improve</b> - <i>Create and implement a plan to increase member value.</i></p>	

**Goal 2: Optimize Governance**

*Adopt enhancements to the governance system to keep the Executive Council (EC) on target with Strategic Goals, flexibility to respond to external challenges, and efficiently keep tasks/projects moving forward between board meetings.*

Key objectives

- Conduct a governance review to provide recommendations on policies, procedures and systems
- Create Roles and Responsibilities documents
- Develop meeting, follow-through, and accountability protocols and train the EC on the protocols

<b>Key Accomplishments</b>	<b>Incomplete Initiatives</b>
<ul style="list-style-type: none"> <li>• Bylaws changes</li> <li>• Exec Trio managing day-to-day business</li> <li>• Annual Report</li> <li>• Consent Agenda</li> <li>• EC reporting</li> <li>• Roles and Responsibilities doc largely in place</li> <li>• Updated P&amp;P</li> <li>• Strategic Focus Areas on agendas and website</li> </ul>	<ul style="list-style-type: none"> <li>• Finding people to serve on EC</li> <li>• Drawing from same pool of volunteers, succession planning</li> <li>• Ashley taking on a lot of initiatives and could use more help                             <ul style="list-style-type: none"> <li>-Define scope of work and affordability</li> </ul> </li> <li>• Clarify “you don’t have to do everything” as much as directors direct other volunteers</li> <li>• Create Volunteer Pool</li> </ul>

**Preserve/Improve/Eliminate?**

Eliminate – continue operationally

**Goal 3: Expand and Leverage Industry Partnerships**

*Establish and execute a process for identifying and prioritizing organizational outreach needs to enhance NHCA’s profile, market programs and services, and find research and advocacy partners.*

Key objectives

- Research possible partner organizations (identify overlap)
- Create weighting criteria based on organizational priorities
- Identify and execute specific initiative areas for advocacy campaigns; webinars; position papers and member development efforts

<b>Key Accomplishments</b>	<b>Incomplete Initiatives</b>
<ul style="list-style-type: none"> <li>• Prospectus</li> <li>• Good luck reaching out to interested volunteers</li> <li>• Jesse understands sponsor wants</li> </ul>	<ul style="list-style-type: none"> <li>• Started partner development -research, need additional EC help</li> <li>• Get MOUs in place with IHW, UK HCA, CAOHC, AAA...</li> </ul>

<ul style="list-style-type: none"> <li>• CIVICA will help with sponsor outreach moving forward</li> <li>• MOU with ASHA</li> <li>• Strengthen relationship with CAOHC via webinars, cross marketing</li> <li>• UK HCA – loose partnership (conference overlap and sit in on board meetings)</li> <li>• Spotlight article in IHW magazine</li> </ul>	<ul style="list-style-type: none"> <li>• How can we bring in hearing aid manufacturers</li> </ul>
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**Preserve/Improve/Eliminate?**

Preserve

**Goal 4: Establish Financial Resilience**

*Establish a system to develop and monitor a comprehensive financial management plan that allows a set amount in reserve in case of emergencies as well as funding to launch new initiatives.*

Key objectives

- Determine amount that needs to be in reserve to address emergencies
- Establish a system to ~~invite~~ evaluate and invite and prioritize new initiatives
- Establish a system to prioritize new initiatives and seek EC approval
- Calculate dollar amount needed for new initiatives
- Create and distribute an Annual Report for the membership

<b>Key Accomplishments</b>	<b>Incomplete Initiatives</b>
<ul style="list-style-type: none"> <li>• Annual Report in place</li> <li>• IHPFT Symposium</li> </ul>	<ul style="list-style-type: none"> <li>• “New initiatives/dollar amounts needed” -Need to be stronger and have more financial stability, questioning board skill set and true picture of NHCA as a business. Identify large impact initiatives.</li> <li>• Finance committee – not established, question if we should</li> <li>• Identifying new sources of revenue (beyond webinars and symposium)</li> </ul>

**Preserve/Improve/Eliminate?**

Preserve and improve

## Situational Analysis – Surveys and Interviews

In a pre-retreat survey, questions were asked to elicit responses revealing the organization’s internal strengths, weaknesses, as well as external opportunities and threats.

<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>• Welcoming Atmosphere, Inclusivity</li> <li>• Educational Opportunities</li> <li>• Scholarship Support</li> <li>• Industry Leadership</li> <li>• Community</li> <li>• Networking</li> <li>• Resource Management</li> <li>• Research</li> <li>• Knowledge-Sharing</li> </ul>	<ul style="list-style-type: none"> <li>• Presentation for Service Providers</li> <li>• Communication</li> <li>• HCP Partnerships</li> <li>• Financial Resilience</li> <li>• Membership Engagement</li> <li>• Public Positioning</li> <li>• Member Resources</li> <li>• Sponsorship</li> <li>• Membership Retention</li> <li>• Adaptability</li> <li>• Volunteer Support</li> <li>• Industry Connection</li> <li>• Membership Growth</li> <li>• Publicity and Outreach</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Public and Stakeholder Engagement</li> <li>• Awareness Campaigns</li> <li>• Virtual Outreach</li> <li>• Partnerships and Collaboration (ASA, AIHA, ISEA, NSC, Etc.)</li> <li>• Membership Growth</li> <li>• Innovation and Health Connection</li> <li>• Standard-Setting</li> <li>• Digital and Hybrid Events</li> <li>• Management Relationship (increasing sponsorship/ membership)</li> </ul>	<ul style="list-style-type: none"> <li>• Membership Challenges</li> <li>• Financial Stability</li> <li>• Conference Dynamics</li> <li>• Relevance and Outreach</li> <li>• Resource Allocation</li> <li>• Volunteer Management</li> <li>• Competitive Landscape</li> </ul>

## Strategic Considerations and Priorities

Based on the results of the market analysis and team survey, key areas for strategic consideration were developed. Additional questions to consider were added to the list during the retreat. The Leadership Team worked together to determine their top strategic concerns based on these considerations.

### Key Strategic Considerations:

How can we . . .

- Grow membership by broadening the scope of professionals participating, as well as attracting a younger demographic?
- Best leverage partnerships and collaboration with like-minded organizations?
- Establish financial resilience to assure long-term sustainability?
- Create more robust member value through new educational and professional opportunities?
- Better support student members and younger members?
- Position NHCA as a leader in public information and resources for hearing loss prevention?
- Support and promote innovation in the field of hearing conservation?
- Better support volunteers/prevent burnout in a very volunteer-driven organization?
- Build awareness through campaigns, as well as public and stakeholder engagement?
- Be on the leading edge of standard-setting?
- Become more relevant globally?
- Most effectively increase sponsorship opportunities?