Strategic Plan



American Holistic Veterinary Medical Foundation

October 18, 2013

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**Comment on goals:**

S.M.A.R.T. model will be applied to yearly plans which derive from this master plan. No guarantees that everything in this plan is be attainable in 10 years, especially because CAVM has a lot of unknown/surprise factors. Example: recent 2012-2013 big push to require rabies vaccinations for VERY young puppies in some states (including CA) which totally ignores AAHA recommendations let alone our own recommendations. This impacts which research we support: resulted in sudden need to heavily support Rabies Challenge Fund vs. much lower level of funding in past. Would not have been part of strategic plan until early 2013. It shifted a ~~big chunk~~ large amount of money to them, so 1 less research project than anticipated funded that year.



**HISTORY**

The American Holistic Veterinary Medical Association (AHVMA) was founded in 1982 with the goal of has promoting education and research in holistic veterinary medicine (also known as Complementary and Alternative Veterinary Medicine (CAVM), integrative veterinary medicine, and as integrative holistic veterinary medicine). In 1986, the Memoriam program was established, enabling us to secure funding for research in CAVM that continues today. In 1992, we launched a successful scholarship program for veterinary students interested in holistic veterinary medicine that has grown from a single scholarship to over eight today.

In 2007, the American Holistic Veterinary Medical Foundation (AHVM Foundation) established its non-profit status in Maryland as a separate organization. However, initially there was no separate corporate activity. In 2011, the Board of Directors (BOD) conducted a feasibility assessment of the Foundation moving to California, . The results revealed the move would be beneficial on several levels. Therefore, we setup operation as a foreign corporation in California the same year. In 2012, we held our first significant fund drive. A corporate partner matched this fundraiser 2 to 1 enabling us to raise over $600,000.

In only two years, the Foundation has had numerous significant accomplishments:

* Developed a Strategic Plan
* Designed Program Plans
* Awarded 8 research grants
* Increased funding available for scholarships
* Established Artists for the Foundation
* Implemented a Professional Advisory Group
* Started a Twitter feed and Facebook page
* Established a Huffington Post column
* Designed a website featuring
  + Animal Teachers, animal stories about CAVM, and a blog
  + Pages for students and researchers
  + Donation pages
* In addition, a one-time grant was advertised in order to identify FIVE to SEVEN veterinary professional schools that would commit to building exceptional programs in integrative and alternative veterinary medicine and research. (10 potential colleges were identified.) Programs now exist at Colorado State University, Tufts University, University of Florida, Louisiana State University, University of Tennessee, Washington State University, and Western University. There is also interest at Colorado State University, North Carolina State University and University of California at Davis.



**MISSION AND VISION**

The ***Mission*** of the Foundation

The Foundation was established to receive and administer funds for research and education in all aspects of integrative medicine, especially as it pertains to the discipline which is called variously, holistic, alternative, or complementary veterinary medicine, or CAVM. The Foundation concentrates on three aspects of CAVM: scholarships for veterinary students interested in this branch of veterinary medicine, research in this discipline of veterinary medicine, and support for the use of and education in this discipline in veterinary schools.

The ***Vision*** of the Foundation

The Foundation focuses on funding quality research and education in topics of CAVM in an effort to advance the discipline of Integrative Veterinary Medicine. By helping with the development of excellent Integrative Veterinary Medicine programs in veterinary schools, the Foundation will be instrumental in supporting and creating One Medicine, a more holistic approach to healing that can transform and enlighten our professional approach to health.





Strengths Weaknesses

Opportunities Threats

SWOT Analysis

Strengths and weaknesses are internal measures, focusing on the Foundation itself, whereas opportunities and barriers are external measures, focusing on the world at large. Any actions by the Foundation should concentrate on building on strengths and exploiting opportunities, while at the same time resolving weaknesses and avoiding threats. Strengths can also be weaknesses, as seen below.

**Internal**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **STRENGTHS** | Notes: | **WEAKNESSES** | | Notes: |
| 1. Staff | Long time history and institutional knowledge | 1. Only one staff member has experience with charitable groups, grant process | | Member is supplying info/forms , models, and program planning to prepare AHVMF for grant process |
| 1. Website | Updated regularly; feeds Facebook page | 1. Website | | New material primarily from one member; a lot of responsibility for limited internal resources |
| 1. Membership potential | C&B calls for membership; good database of potential members | 1. No membership procedures in place | | Program plan with deliverables needs to be developed for membership; membership committee would help |
| 1. Finances | Currently no debt or concerns of financial difficulty for current needs | 1. Finances | | 2 donors responsible for 2/3 of funds. Need to develop additional large sources; may lose one source |
| 1. Committed Leadership | Contribute voluntarily in many ways | 5. Limited “grooming” of future volunteers | | Need to continue engaging younger members |
| 1. Effective, functioning Board | Strive to accomplish many goals each year | | 6. Volunteer/member utilization not robust | Volunteer mgmt is weak |
| 7. Potential Vendor/Sponsor relationship | Some discussion with a few vendors; at least 2 do support students | | 7. Managing vendor/ sponsor relations and recruitment is limited to one person (or small group) | Have potential to recruit many more vendors/sponsors; need to expand responsibility and decision-making in this area |
|  |

**External**

|  |  |  |  |
| --- | --- | --- | --- |
| **OPPORTUNITIES** | Notes: | **BARRIERS** | Notes: |
| 1. Good Relationship with other organizations. Huge potential for collaboration | Identify needs and potential partners; assess existing programs in which AHVMF may be able to participate | 1. Current interpretation of Evidence-Based Medicine (not Sackett’s version) | Constant need to assess differences and commonalities |
| 1. Good general relationship with universities | Continue to be transparent and promote frequent communication with them | 1. Need more visibility and credibility | Target all opportunities to “brand” AHVMF |
| 1. Pet owners | Huge numbers of clients to educate and expose to holistic vet profession/practices, etc. | 1. Pet owners | Need broader understanding of holistic vet practices/ benefits, etc. |
| 1. Generational diversity | Brings broad scope of knowledge, skills and member input | 1. Generational diversity | Difficult to please all segments/ demographics |
| 1. Public awareness – Public Health and environmental issues, globalization/growing awareness of CAM | Potential for broader branding and education of holistic vet practices | 1. Economy | Members have less money and time to devote to association memberships, clients cut back on pet care |
| 1. Follow up on donations | Consistently show appreciation for their contribution; e.g. letter to editor | 1. Pharmaceutical industry | Agenda can be a barrier to good quality research |
| 1. AVMA HOD member | Potential for much greater recognition of CAVM and AHVMA among conventional vets |  |  |

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**I. Support and Promotion of the Foundation**

**Goal:** **Establish the AHVMF as the principal organization in the discipline of integrative veterinary medicine practice and research.**

**Objective: *To build the capacity of our organizational financial sustainability - collaboration between Executive Director (ED), Nancy Scanlan, and Deputy Director (DD), Darlene Knowles***

***Strategy:***

* Continue with Biannual fund drives (ED to coordinate with RP)
  + Review dates to determine if these are the best times by Nov 30, 2013
  + NS Finalize change of website credit card processor by Nov 15, 2013
* Secure funding via Foundational & Corporate grants and donations

Tactics:

* DD to research opportunities and create funding project plan completed by May 30, 2014
  + DD to apply for organization and program funding beginning June 2014
  + Create membership categories, dues, membership benefits by Dec. 31, 2013
* Tactics:
  + Create membership committee by Nov 30, 2013
  + Reach out to donors via email to become members as part of fundraising drive Jan 2, 2014

***Objective:******To effectively target******the primary modalities utilized in our Association.***

(Acupuncture, TCM Herbal, Western Herbal, Chiropractic, Classical Homeopathy, Homotoxicology, Flower Essences, Biological Therapy (use of living agents such as bacteria, fungi, leeches, bees, etc.), Reiki, Cranio-Sacral Therapy, Osteopathy and other modalities involving use of energy medicine)

* Identify specific modalities to target each year
  + ED to survey BOD and advisory groups by Jan 30, 2014
  + ED to survey donors/public to determine their preferences by Feb 30, 2014
  + ED to survey CAVM organization members by Mar 30, 2014
  + ED to compile complete list of all modalities, ranked in order of votes from most to least April 30, 2014

***Objective: To develop a PR and Marketing Program – Collaborators: President, Richard Palmquist, and President-Elect, Barbara Royal.***

* Create a Website story of the Foundation for the public and post it to the web site
  + RP to write a story, BR to edit by Jan 2, 2014
* Improve the biographies of all Board Executives and Officers as well as Advisory Council Members
  + ED to contact all Board Execs officers by Jan 2, 2014
  + RP to review biographies by Jan 15, 2014
  + ED to upload biographies received to website by Jan 30, 2014
  + DD to email non-responders monthly thereafter (as needed)
  + ED to contact all Advisory Council Members by Feb 15, 2014
  + RP to review biographies by Feb 28, 2014
  + ED to upload biographies received to website by Mar 15, 2014
  + DD to email non-responders monthly thereafter (as needed)

***Objective: Internal Personnel Contact List - ED and DD in charge.***

* Keep an updated list of all Board, Advisory, and Council members and their contact information.
  + ED to Create BOD and staff – only area in website by Feb 1, 2014
  + DD to create and update lists and post to this area of website by Feb 28, 2014

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**II. Education**

**Goal: to have CAVM departments in one third of all US veterinary schools by 2023.**

1. **Veterinary schools**

***Objective:******To establish CAVM Learning Centers in Veterinary Schools - Richard Palmquist In-Charge.***

* As identified by the one-time grant award, discern how to target the veterinary professional schools who indicated interest in CAVM
  + Nancy Scanlan to List all schools Nov 30, 2013
  + RP to characterize efforts of University of Tennessee and Louisiana State University and publish on website by Dec 31, 2013
  + RP to Identify 2 specific schools to target for the year 2014 by Jan 31, 2014
  + RP and NS to develop list of all schools and rank them in the order to approach them Feb 15, 2014
  + Review list and ranking on same month/day each year, choosing 2 new schools each year until all US schools have been approached by 2024
* List appropriate personnel at 2 targeted schools each school from administrative to research and academic who are interested in our goal. Strive to create on-the-ground liaison between a qualified CAVM clinician and the program. (All to be completed by 2023)
  + RP to identify appropriate personnel by Jan 31, 2014
* Develop individualized plans for each school and begin to assist them in research and education in the areas where they have expertise.
  + Develop chart of modalities and veterinary schools which currently represent each. NS April 1, 2014
  + Examine areas of expertise in each school to determine which modalities to support NS April 15, 2014
  + Review grant applications from each school to determine possible research to be supported NS April 30, 2014
* Connect private donors with the programs that assist their purposes in accordance with the goals and purposes of the Foundation.
  + DD to identify grants appropriate for each school or modality by May 23, 2014
* Develop a policy for Colorado State University
  + RP to Contact (David Twedt who is a friend of RP May 15, 2014
  + RP to develop list of friendly contacts in equine unit June 1, 2014

1. **Veterinary students**

**Goal: Increase awareness of and education in CAVM among all veterinary students.**

***Objective: To enhance Student Holistic Clubs – Scholarship Committee Chairperson, Marge Lewter, collaboration with input from AHVMA Student Advisor, Jen Burton, and AHVMA membership committee chair Madeline Yamate (Note that the last 2 are from AHVMA, not AHVMF).***

* Help student holistic clubs fund various CE efforts and see their officers get appropriate support during professional school and after graduation through employment.
  + ML, JB, MY contact vet schools as part of scholarship project by Jan 2, 2014
  + Identify AHVMA members to visit each US vet school between November and April – ongoing
  + Identify/verify faculty liaison for each SAHVMA organization
* Create PowerPoint and web-based lectures introducing each modality on the FDN web site

covering all by 2018

* + Begin with intro course PowerPoint’s from speakers. Oct 15, 2014

***Objective: Increase availability and number of scholarships in CAVM available for Veterinary Students - Marge Lewter In-Charge.***

* Post scholarships and names, requirements for each to the web site.
  + ML to supply past poster, present poster, student entries from last year by Dec 31, 2013
* Notify professional schools and appropriate undergraduate schools so guidance counselors are aware of these resources.
  + ML by Jan 31, 2014
* Continue scholarship Silent Auction/Raffle program with AHVMA
  + Contact new AHVMA ED about this program Feb 1, 2014
  + ED to help with Silent Auction payments yearly at conference (Sept or Oct of each year)

***Objective:******To Create a Pre-Professional School Program - Barbara Royal and Richard Palmquist with AHVMA liaison Natasha Lilly working on this.***

* Develop a pilot project at Cal Poly San Louis Obispo, CA that will mentor and funnel interested and talented students into the profession.
  + Establish written guidelines for Cal Poly SLO by February, 2014

**C. Veterinarians**

**Goal: To have the majority of veterinarians use or refer to practitioners of integrative medicine**.

***Objective:******To create interest and support for unbiased scientific investigation used to find solutions to real health problems in animals (and, indirectly, people), especially to drive veterinary students and young practitioners to research or professional science-based careers.***

* Join AHVMA at their booth at veterinary meetings in January and February 2014
  + Identify staff member or Foundation member to staff each booth

***Objective:******To use our knowledge and influence to improve health care for animals and, indirectly, humans everywhere****.*

* On website
  + NS Develop template for interviews of holistic veterinarians Jan 2, 2014
  + Using the template, interview 1 or more holistic veterinarians per month – ongoing monthly
  + Post interviews in blog monthly
  + NS Visit 6 holistic veterinarians beginning with Southern Oregon and Northern California to take pictures of patients, interview owners and veterinarians June through August 2014
* Through social media
  + Use Facebook page and Twitter to advertise each and link back to webpage – monthly

**D. Public Awareness**

**Goal: Increase consciousness of and knowledge of CAVM.**

**Objective: *To educate pet custodians on the benefits of integrative medicine.***

* Exhibit at and sponsor pet events
  + RP Bassacre summer 2014
  + NS Dog Walk for Cancer – Mount Shasta, August 2014
* Reach out via social media
  + RP – Facebook and Twitter
  + RP – Huffington Post Column
* Website
  + RP and NS Animal stories items
  + RP and NS Veterinarian – related items
  + RP, researchers, NS Research progress



**III. Research**

**Goal:**  **To increase quantity and quality of CAVM research.**

***Objective:*** ***To use the scientific method to reform and modernize vaccination policy.***

* Support Rabies Challenge Fund (RCF) and similar research activities
  + BOD Review existing funding and funding history for RCF and determine amount needed from Foundation August 2014
  + NS Establish web page for RCF September 2014

***Objective: To develop new methods of research and validation that are effective, less destructive of animal life and useful in enhancing integrative veterinary techniques.***

* Campaign to return Case Studies to an accepted place in Evidence-Based Medicine
  + Review items presented at Case Studies Workshop in 2013 AHVMA Conference RP by Jan 2, 2014
  + RP Solicit Case Studies from AHVMA members through each AHVMA Journal ongoing

***Objective: Research Development and Administration of Grant Program-Jean Dodds In-Charge.***

* Invite Mark Rishniw from VIN to the Research Evaluation Group. RP by Dec 31, 2013
* VIN's founder, Dr. Paul Pion, who is supportive of our efforts in this area, should be contacted in order to help garner professional talent and build consensus and support. RP by June 1, 2014
* Search out a nutritionist who will support evaluation of biologically appropriate diets and training.
  + Contact Joe Barges and Donna Raditic at University of Tennessee RP by July 2014
  + Discuss outline of nutrition program and potential research projects RP by July 2014
* Collect identities of qualified researchers, initially preferentially at schools we are assisting in development, so we make them opinion leaders of this field.
  + Add 6 to our current list by August 2014 – RP, JD, NS
* Review and fund appropriate studies.
  + Grant committee to continue in January and June 2014