

1 **Oregon Society of Medical Assistants**
2 **Strategic Planning Team Report to the General Assembly**
3 **For period ending April 10, 2021**
4

5 The Strategic Planning Team is responsible for:

- 6 1. Evaluating the needs of OSMA and incorporate them into the Strategic Plan.
 - 7 2. Oversee compliance with the current Strategic Plan.
 - 8 3. Provide support to other teams and positions striving to achieve set goals.
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10 For 2020-2021, the composition of the teams for OSMA have been altered due to the COVID
11 crisis. As Teams are unable to meet face to face, other arrangements have been made. President
12 Miller assigned the OSMA Board the task of Strategic Planning. The goal of strategic planning is
13 to incorporate the Strategic Plan of AAMA, where possible, into the OSMA plan, as well as set
14 up short, mid, and long term goals to achieve the plan itself. The plan should be evaluated
15 annually and adjusted as needed.
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17 President Candy Miller, CMA (AAMA) held a Strategic Planning Meeting for OSMA via Zoom
18 on August 25, 2020. Many experienced members and new members attended. The discussions
19 focused on the most critical issues that OSMA is facing: Communication, Education and
20 Leadership Development.
21

22 **1. Communication:** A Planning Team was formulated: Andrea Erickson, CMA (AAMA),
23 Rachel McLeod, CMA (AAMA), Shawn Molnar, CMA (AAMA) and the Communication
24 Chair, Paula Purdy, CMA (AAMA). They will focus on Social Media formats and upgrading
25 existing platforms. These may include direct communication from the OSMA President to
26 Chapter Presidents, kudos, member information, education announcements, newsletter,
27 AAMA communications and updates. They will create a plan as to how best to reach out to
28 members and develop a timeline to do this.
29

30 **2. Education:** OSMA will become the education planner for the State membership. This is
31 due to a need to reach all state members versus a chapter-only format. RCCMA has already
32 held several recorded Zoom webinars that can be available for OSMA member use. There
33 may be a cost for a bundle of these recordings, but that would then pay for the cost of
34 producing the Zoom format. There is a sponsor, Med-X, for 2021 to help on expenses.
35 Members of the RCCMA Education Team, Andrea Erickson, CMA (AAMA), Virginia
36 Chambers, CMA (AAMA), and Gabby Carrillo, CMA (AAMA) will head up this endeavor
37 and gather other members along the way.
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39 **3. Leadership Development:** President Purdy, CMA (AAMA) was responsible for setting
40 up a Leadership event for 2021. This year the event was held February 27, 2021, via Zoom.
41 The Leadership Manual and the Board Manual are currently being updated via Zoom
42 meetings. The manuals will be available to the OSMA Board for 2021-2022.
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44 President Miller thanks the participants in these endeavors to create a stronger organization.
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46 Submitted by,

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48 Jocelyn Willis, OSMA Secretary 2020-2021