

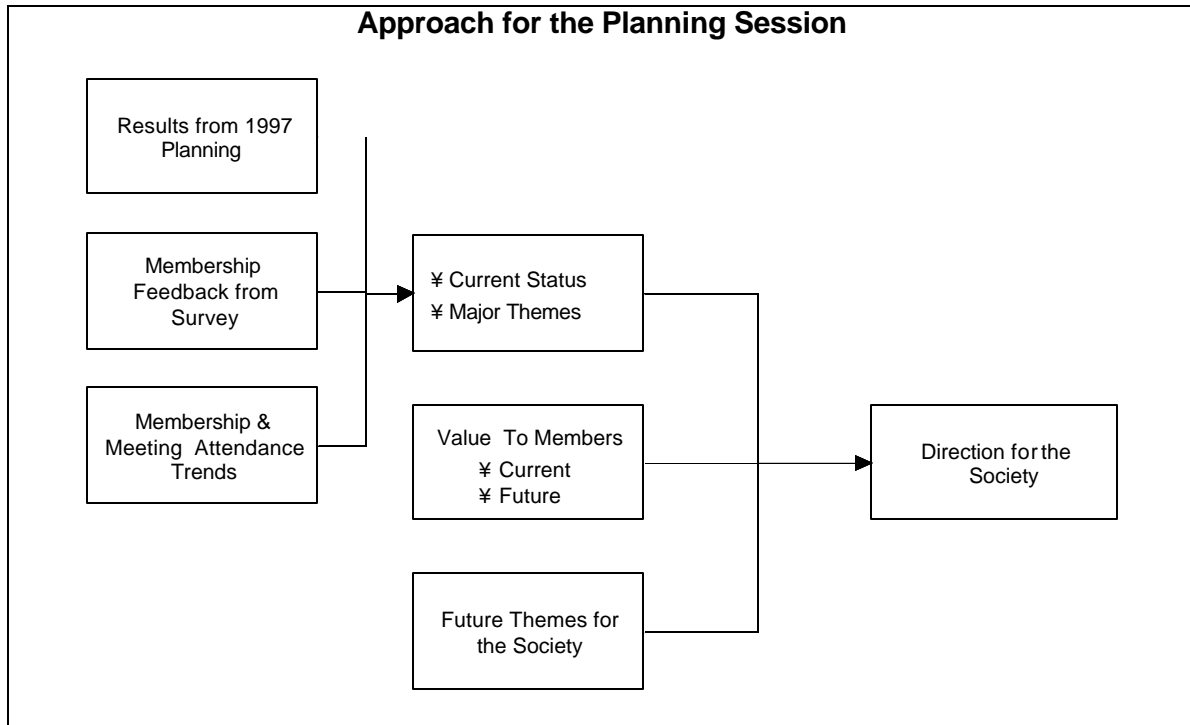
Teratology Society

Recap of March 2002 Planning Session

April 4, 2002

Teratology Planning Session Recap

The approach for the Teratology Society's planning session was developed to recognize previous planning efforts performed, utilize future visions and ideas for the Society, and include member feedback.



Prior to the session, the attendees received the results of the membership survey along with an historical summary of the Society. The attendees started the session by reviewing the results and actions of the 1997 planning discussions and estimating the progress and success achieved.

Prioritized Items From 1997

- 1) Identification of the Mission and Name of the Society
- 2) Partnering with advocacy and scientific groups
- 3) Attracting new basic science and clinical members
- 4) Addressing the financial needs of the Society
- 5) Modifying the organization, content and venue of the annual meeting
- 6) Increasing the diversity and content of, and contributors to, the journal
- 7) Redefining and Marketing the journal
- 8) Improving the management of the Society
- 9) Changing the scientific program of the annual meeting to attract new constituency
- 10) Developing effective partnerships
- 11) Closing the management gap at level of Council and Executive staff
- 12) Improving the scientific and research content of the meeting

The attendees felt the Society had advanced most on the following items (listed in order of accomplishment/success):

8. Improving management of the Society,
11. Coordination and relationship between the council and the executive staff,
4. Improving the financial status of the Society,
7. Redefining the structure and financial arrangements of the journal,
5. Modifying the organization, content and venue of the annual meeting
1. Updating the mission, and
1. Evaluating the name of the Society

The attendees felt the Society has made less progress on the other items identified during the 1997 discussions (listed in order of accomplishment/success):

12. Improving the scientific & research content of the meetings
9. Changing the scientific program of the meetings
2. Partnering with advocacy groups
10. Developing partnerships
6. Increasing the diversity, content of, and contributors to, the journal
3. Attracting new basic science and clinical members
7. Marketing the Journal

Upon discussing the evaluation of the progress, the attendees realized that most progress had been achieved on issues and items relating to the infrastructure of the Society and that those improvements will enable progress on the others.

Next, the attendees reviewed the results of the recent membership survey in light of the 1997 items and the their evaluation of progress. The feedback from the membership survey was consistent with the attendees' evaluation and the needs remaining from the 1997 planning.

Recognizing that the Society serves its members by providing value to them, the attendees then explored the major constituent groups within the membership and discussed the value that each group receives today and what they would expect to receive in the future.

Value Expected From Teratology Society

<u>Constituent Group</u>	<u>Current</u>	<u>Future</u>
Government	<ul style="list-style-type: none"> • Staying abreast of science • Communicating science • Having a sounding board for policies • Networking • Enjoyment/Social Interaction (Volleyball) 	<ul style="list-style-type: none"> • Round table discussions on neutral turf; building consensus • Discussion of breaking news • Training <ul style="list-style-type: none"> - From web courses to face to face courses - Possibly leading to accreditation • Recruitment and student contacts • Enjoyment/Social Interaction (Volleyball)
Industry	<ul style="list-style-type: none"> • Scientific updates • Current developments and issues • New approaches and methods • CE courses/symposia • Networking <ul style="list-style-type: none"> - Interactions with clinicians and real world problems - Interactions with gov't employees - Interactions with basic scientists - Finding consultants - Finding employees - Collaborations - Catching up with friends & colleagues • Validation of professional identity 	<ul style="list-style-type: none"> • Venue for industry publications [B Journal] • Visibility of Society to all segments for support to convince companies to donate money & support employees attending the meetings • Facilitate scientific understanding and harmony between industry and regulatory agencies; consensus building opportunities; collaborations with clinicians and translation of risk communication • Create consensus papers of significant impact (would derive from workshop or symposium involves as many stakeholders as possible)
Academia	<ul style="list-style-type: none"> • Forum for members to meet other teratologists and present data • Forum for students to meet other teratologists and present data • Networking inside and outside academia • Place to learn what is going on in teratology 	<ul style="list-style-type: none"> • Increase exposure to things clinical [tie to the real world] • Develop interaction with outside sources of funding [side from Federal funds] • Increase training opportunities for pre and postdoctoral students in industry/government • Ability to have a strong voice in formulating public policy vis a vis teratology • Specialty courses for students, e.g., embryology • Journal that is scientifically strong, high impact, high visibility • A Society that is recognized by the public, academia, industry and government as the premier Society dealing with birth defects • Interaction
Clinical	<ul style="list-style-type: none"> • Forum for members to meet other teratologists and present data • Forum for students to meet other teratologists and present data • Networking inside and outside academia Place to learn what is going on in teratology 	<ul style="list-style-type: none"> • Forum for risk assessment and translating basic research into risk assessment and then into communication • Input to influence basic research, gov't, and industry • Identifying areas of research needs • Education courses in molecular epidemiology • Application of basic research data to the clinic, e.g., folic acid, susceptibility factors

A summary observation by the attendees after the discussion was that the value derived, and expected to be derived in the future, is essentially the same regardless of the group. Thus, the diversity of the Society could be, and should be, treated as a strength, instead of a weakness that dilutes the focus and efforts of the Society.

The attendees then explored the four traditional roles of Associations/Societies and how they apply to the Society and the Society's dimensions of success.

Traditional Roles Of Associations & Societies

1. Member Education
2. Communication
3. Advocacy
4. Bringing people together

The dimensions of success are those areas in which the Society must perform well for it to be viewed as successful overall. The attendees identified the following as the dimensions of success for the Society:

- | | |
|------------------|----------------------|
| ➤ Journal | ➤ Education/training |
| ➤ Annual Meeting | ➤ Membership |
| ➤ Advocacy | ➤ Impact/recognition |
| ➤ Partnerships | ➤ Financial |
| ➤ Web site | |

The attendees next reviewed the Society's mission statement and confirmed its fit and validity based upon their current thoughts and membership feedback. That discussion also identified two directions and activities the Society could consider taking that would fit with the existing mission statement:

- "Advocacy" and the extent to which the Society should be proactively involved in advocating positions on public policy issues.
- "Facilitating Consensus" by proactively bringing people together from different constituencies on scientific issues relevant to the advancement of scientific knowledge required relevant for policy decisions.

Advocacy

As the attendees discussed the Society and a potential advocacy role, four options of advocacy for the Society were illuminated in the discussion:

1. Advocating that "good, sound, clean science" be used as a foundation for research and public policy discussions.
2. Actively entering public policy discussions and putting forth/advocating specific positions on public policy on behalf of the Society and its members.
3. Having the Society be involved in the policy discussions and decisions by contributing the science and research needed to be considered by public policy makers.
4. Educating Society members about the public policy issues to support their individual involvement and voices in public policy debates and decisions.

The attendees were split on this topic and recognized that:

- a) A more specific, in depth discussion is needed to reach a decision for the Society on what type of advocacy role, if any, it should adopt and the ramifications of taking that role to its membership, and

- b) The Society has other needs and decisions pending on current roles and activities with immediate consequences to the health of the Society and its ability to provide value to its members.

As such, the attendees agreed to continue on and focus upon those aspects of the Society that were already defined in its roles and activities.

Facilitating Consensus

The attendees discussed the concept of facilitating the development of consensus among Academic, Clinical, Governmental, and Industrial constituents as a vehicle for the Society to have broader impact. This role could be built upon the Society's diverse membership and translate what is now viewed as weakness into a strength. The ensuing discussion explored the differences and trades offs between this potential role and that of developing position papers. The idea was explored further on the second day as attendees developed ideas and themes of the Society in the future and how it would support the advancement of the science along with its application in Clinical, Academic, Government, and Industry realms.

In the beginning of the second day attendees worked to develop some views (themes) of how the Society would add value in the future, and to define dimensions of success with potential measures.

Themes for the Future

In small groups, the attendees developed "cover stories" about the Society that one would see written in the press in the year 2007. Cumulatively, these cover stories defined and illustrated themes of the Society in the future. Reviewing the "cover stories" identified the following four (4) themes of the Teratology Society in the future.

1. View & Exploit Diverse Membership as a Strength –
 - Use the diversity of membership as a strength and foundation for supporting the advancement of the science, education, and policy
 - Facilitating consensus and understanding
 - Promoting and supporting a multi-disciplinary approach and interaction
 - Coordinating and harmonizing research activities & funding
 - Bringing together technology and tools
 - Creating partnerships and involving clinicians who provide teratogen risk counselling
 - Continuing to attract and serve a diverse membership
2. Use the Web as a mechanism –
 - To draw in students
 - To provide and move data among members and constituents
 - To facilitate collaboration among members
 - To provide and facilitate interactive discussions across disciplines
3. Enhance the Society's Education Activities –
 - Reaching out to students at both graduate and undergraduate levels
 - Providing educational tools – IT based and accessed on-line
 - Expanded focus to include application and people affected
4. Adopt A Facilitation Role To Proactively Bring People Together On Scientific Issues Relevant To Policy
 - Encompass multiple disciplines and constituencies
 - Develop and sponsor consensus building workshops

- Provide a vehicle to have a broader impact at the policy level

Definitions of Success and Potential Measures

Based upon the dimensions of success listed on the first day, attendees developed preliminary definitions and potential measures for each dimension of success. The draft results are in the following table and the Council accepted completing these definitions and measures as an action item. (Develop and use an annual scorecard of performance.)

Draft Definitions & Measures for Society's Dimensions of Success

Dimension	Definition of Success (What would it look like?)	Potential Measures
Journal	<ul style="list-style-type: none"> • Reflects and supports the diversity of the Society • Good reputation and high impact factor • First choice journal for those doing cutting edge birth defects research • Technically advanced journal, rapid manuscript review, rolling publication 	<ul style="list-style-type: none"> • Goal: double the impact factor • Increase frequency of online access by scientists • Appropriate rejection level
Education	<ul style="list-style-type: none"> • Supportive of students, integration of student needs with • CE courses/symposia/workshops/sunrise courses • Invite pediatricians/obstetricians/public in city hosting our meeting 	<ul style="list-style-type: none"> • Increased enrollment in CE courses/sunrise courses
Annual Meeting	<ul style="list-style-type: none"> • Membership comes away feeling they have learned something • Choice meeting for researchers doing cutting edge birth defects research • Maximize opportunities for interactions • Fiscally responsible • Attractive and affordable venues • Data driven venue selection • Vendors provide value to meeting 	<ul style="list-style-type: none"> • 60% of membership attending • 10% student attendees • 10% new attendees • 33% of membership submit abstracts • Satisfaction survey • Positive cash flow
Membership	<ul style="list-style-type: none"> • First choice membership of scientists doing cutting edge birth defects research • All significant training programs/centers of excellence/centers of employment have members in Society • International representation 	<ul style="list-style-type: none"> • Increase in corporate membership • Increase in professional societies/associations that have membership • Increase in retention rate during first 5 years of membership • Re-recruit previous members
Partnerships	<ul style="list-style-type: none"> • Need to proactively integrate our mission with other societies that do cutting edge research related to birth defects • Selective strategic partnerships that support our goal • Develop process for establishing and evaluating strategic partnership • Develop strategic partnerships with NIH institutes 	<ul style="list-style-type: none"> • TBD
Financial	<ul style="list-style-type: none"> • Ability to adequately support the mission of our Society 	<ul style="list-style-type: none"> • TBD
Website	<ul style="list-style-type: none"> • First place researchers doing cutting edge research in birth defects turn for relevant information • Members as well as non-members come away feeling they have learned something 	<ul style="list-style-type: none"> • TBD

The attendees then reviewed and summarized the discussions of the session to that point and developed a composite list of priority items for the Society to accomplish in the next 5 years. Then the attendees explored the items for clarity and understanding and evaluated them for level of effort required and impact on the Society. The attendees then agreed on the higher priority items and assigned responsible individuals for each item. The individuals are scheduled to report plans and progress to the Council in June of 2002.

Table of Actions

Item	Priority vote	Level of effort required	Responsible Individual(s)
Journal a) Improve the impact factor b) Increase member participation & submissions c) Follow through on existing plans for the Journal	23	High	Editors
Membership a) Increase the number of members b) Increase the retention rate of members c) Expand membership to include others (e.g. MDs)	16	Medium	Viewed as a result of performing the other activities successfully
Annual Meeting a) Increase active participation (submittals & presentations) b) Promote non-member participation (submittals & presentations)	15	High/medium	Jan Friedman, Ken Jones, George Daston, and Bob Kavlock
Education a) Examine & rethink the committee structure to expand responsibilities b) Develop a stronger Education theme by the Society	14	High/medium	Donna Farmer and Kok-Wah Hew
Bring OTIS and NBTS members into Teratology Society	10	Low	Christina Chambers and Janine Polifka
Improve Society outreach & recognition	10	Medium	Council
Develop Consensus Workshop concepts & plans to initiate the Society's new role	10	Medium	Public Affairs, Christina Chambers
Develop and use a Financial Plan for the Society with a) Clear goals b) Allocation guidelines	7	Low	John Rogers and Finance Committee
Improve Communication Explore and characterize the issue of members feeling everything is top down and propose suggestions and potential solutions	5	Low	George Dearlove and additional members
Develop IT platform for BDR Start by creating a concept and plan as a future effort	4	High	Tom Knudsen
Develop and use annual scorecard of progress for the Society and the Council	3	Low	Council by annual meeting, Jan Friedman will provide draft
Reevaluate Society's role and makeup a) Committee structure b) Should be based upon strategic plan & directions	3	Low	Council
Define, evaluate and develop strategic partnerships	2	Medium	Council
Further develop the Society's website a) Include Education courses b) Make it the Society's "window to the world"		High	Chair of website committee, Robert Felix

The Annual Meeting

The group spent the remaining time exploring ways to improve the Annual Meeting. The group first characterized the issue based upon known facts. The group then listed and discussed the factors that determine one's decision to attend the Annual Meeting, and the factors that define success of the Annual Meeting.

Characterizing the Situation of the Annual Meetings

- Declining number of abstracts submitted
- Attendance is flat
- Registration cost is constant
- Excellent symposia
- Increased competition for meetings to attend – in general and on the specific dates of the meeting - resulting in prioritization of meetings and budget for attendees

Factors in One's Decision to Attend the Annual Meeting (not listed in prioritized order)

- Program -
 - Scientific content
 - People presenting
- Location
- History/habit of the person
- Ability to present at the meeting
- Personal contacts
- Length of the meeting
- Timing of the meeting
- Competing meetings at the same time & date
- Cost -
 - Total cost of attendance
 - Availability of funds – personal and support from one's organization
 - Student support
 - Awards, travel funds
- Other attendees
- Advertising the annual meeting

Factors That Define Success Of The Annual Meeting

Items Society Can Control	Items Society Can Influence
<ul style="list-style-type: none"> ➤ Program Content <ul style="list-style-type: none"> ○ Scientific ○ Social ➤ Location ➤ Facilities and services 	<ul style="list-style-type: none"> ➤ Attendance <ul style="list-style-type: none"> ○ Repeat attendees ○ New attendees ○ Non-member attendees ➤ Media attention ➤ Profit ➤ Number of abstracts (Increase) ➤ Sponsorship (Increase) ➤ Exhibitors (Increase) ➤ Government support

Through the discussion, the attendees determined that while there are a number of factors one considers to decide upon attending the annual meetings, some are controllable by the Society and others may be only influenced. The group identified 3 factors under the control of the Society that either determine one's decision to attend the Society's meeting or contribute to the success of the meetings as:

- Program Content
- Cost
- Timing of meeting & other competing meetings

Although location is a factor, the group felt that the other three factors are the primary criteria. Realizing there are a few factors that the Society can control to make the meetings successful and influence members to attend, the group then brainstormed ideas and options for the annual meetings based upon the 3 factors the Society can control.

Ideas From Annual Meeting Brainstorming

(Not in any order and not approved for action.)

- Extending abstract deadline
- Late breaking abstracts-special session
- Delete simultaneous sessions
- No contributed papers from platform
- Two separate meetings, one only symposia, the other contributed (platform/platform)
- Meet with other high profile societies/associations
- Interdisciplinary symposia
- Meetings every other year (four days in length)
- Add consensus building workshop in prime time
- Out with the old (i.e., Warkany Lecture, MOD symposium, etc.) and focus meeting entirely on current science
- Return to university campus meetings
- Industry/government subsidized meeting
- Revamp CE Course
- Focus each year on one discipline, education on another discipline
- Concurrent focused tracks
- More workshops with member participation
- Simultaneous sessions, shorter meeting
- Improve state of the art science
- Incorporate wide range of interests
- Special session on traditional disciplines
- Bigger role for submitted abstracts
- Specialty sections that construct parts of the program
- Web casting the meeting
- Meeting structured like our tri-partite journal
- Multiple smaller meetings
- More interaction with students/symposia speakers
- Joint meetings that rotate with other societies
- Insert OTIS directly into the program

Upon reviewing the brainstormed ideas, the group discussed a number of them, saw how they could be used, and committed to use a structured process to review and evaluate the brainstormed ideas to identify alternatives that should be tried.

Jan Friedman, Ken Jones, George Daston, and Bob Kavlock will constitute a committee to follow-up on these items and ideas for the Annual Meeting.

Summary

After determining the progress of the Society from the 1997 planning session, reviewing the results of the membership survey, and developing ideas of how the Society would be adding value in the future, the attendees developed and agreed upon a number of activities that define 6 areas of emphasis for the Society as it moves forward:

Areas of Emphasis for the Teratology Society

1. Improve the Annual Meeting attendance and number of submissions by exploring different ideas and concepts for the Annual Meeting
2. Develop and initiate a facilitating consensus role to proactively bring people of different focus together on scientific issues relevant to policy
3. Increase the Society's utilization of Web technology to deliver value to members
4. Continue efforts to improve the Journal
 - a. Move forward with restructuring the Journal into 3 parts
 - b. Increase the membership participation in the Journal
5. Expand the Society's Education activities
6. Enhance the Society's management activities:
 - a. Develop & use measures to track progress & success (annual scorecard of performance)
 - b. Evaluate the Society's committee structure and its roles in light of the directions identified
 - c. Improve the communication with members about needs, changes, inputs, and decisions
 - d. Develop and use a financial plan for the Society

The activities/action items are listed in the Table of Actions along with the responsible individual assigned for each. The attendees agreed that the responsible individual will provide the Council progress updates for each of the items by the Annual Meeting in June of 2002. Some of the items like "Develop IT platform for BDR" are understood to be preliminary concepts and plans that would require further review by the Council before implementing.