



September 24th 2022

Background Material for Strategic Planning Participants

The purpose of this handout is to provide participants in the September 24th Strategic Planning session with: 1) an overview of the goals of the September session; 2) some general guidelines and expectations for participants; 3) a brief overview of the college and its history.

Goals of the Planning Session

The main goal of the strategic planning session will be to create a new strategic plan for the college. Our last plan was created by stakeholders and approved by the governing board six years ago in 2016. At the time it was approved, that plan was envisaged to cover a period of approximately five years. So we are now somewhat past due for a replacement.

Ideally, the new plan will be a written document, forged through a consensus process involving all the participants in the upcoming meeting. The plan will, hopefully, include a set of clear ideas and "big picture" proposals for new projects, changes, upgrades, and improvements that the college might do to its systems, operations, and approaches over the long term. These proposals should be conceptualized at a relatively high (even maybe somewhat abstract) level. They should not include too many detailed "in the trenches" instructions. Ideally they will identify and focus on some of the things we do best, and try to make them better, as well as suggesting improvements where possible.

During the session, we may wish to incorporate ideas from five element theory to assist us. The usual approach to strategic planning was developed by professors at the Harvard Business School more than 50 years ago, and is in wide use. But it typically does not include or rely upon five element ideas, and so we may encounter useful new perspectives and insights! For example, the college is now 34 years old – no longer a baby seedling institution

struggling to put down roots in the world. Our programs are now relatively ripe and the college is relatively mature. So perhaps the elements Earth and Metal may have much to say about where we are at this stage in the college's life-cycle. Bring your five element thinking caps with you as we do this work.

General Guidelines for Participants

1. What You Will Need to Bring

Most important, bring yourself! Be sure to bring a small kitten if you have one. (All Zoom users know this rule.) Grown up cats are OK, but less ideal. Dog owners: your dog is welcome too, but the more closely it resembles a kitten the better. On the day of the planning meeting, you should be well rested, with plenty of brain space available for chewing on interesting and thorny issues. Keep some tasty nibbles and eight glasses of water at your side, and set yourself up in a comfy space where you can jump up and do some movement exercises, or scream silently in frustration, should the need arise.

We are anticipating that the session will last most of the day, so we will plan for regular breaks and a decent lunch period. But please be available for the entire day if you can (9 am-5 pm).

It will be best if all participants have access to a computer with an internet connection during the day. If you intend to connect via Zoom to the session on your home computer or laptop, this connection should be sufficient. On the other hand, if you intend to connect to the session via Zoom on your cellphone, you will probably need to have access to an additional computer connection with internet access as well. This is because now and then we will ask you take time out to complete online questionnaires and voting during the day, and this process will be most easily accomplished via a separate computer connection.

You will also need a fresh pad of paper and some pens, probably a highlighter or two!

2. Zoom Expectations

Most of you will probably be familiar with the Zoom experience by now. This group may be moderately large, and we will go over process guidelines at the start of the meeting. For example, we will discuss how to facilitate Q&A sessions and brainstorming activities during the day. Anticipate some housekeeping and organizing at the start of the day. We will try to organize some group activities (e.g., chat room type structures) as well as time for quiet individual reflection. We will keep an online "feedback & comments" box available for the entire day where you may drop suggestions or ideas if things occur to you during the day.

3. Rules of Engagement

This kind of work can be inspiring and fun, and we will definitely want to spend time considering things that the college does well. But sometimes, sessions like this can also be challenging, because we may also talk about potentially difficult or sensitive topics. For example, we might discuss a policy of some kind, perhaps one affects a lot of people, but that isn't working out so well. Why has this happened? How can we fix it?

In these kinds of situations, we will need to be careful to avoid stepping into the delicate territory of doing "job performance evaluations" for individuals associated with the college (either now or in the past). This will not be our role, and it would be inappropriate for a group like this to engage in these kinds of activities. This guideline will be true even if you firmly believe that certain individuals may perhaps be "responsible" for things being less than ideal. We will all need to maintain a scrupulous professionalism in this regard.

Generally speaking, come with your best ideas for improvement and creative solutions! We will encourage problem-identification and the free flow of ideas during the day via brainstorming and other approaches. Ideas for improving things will always be welcome. But also, be aware that sometimes lists of ideas that are collectively generated can soon get very long. We may have to call upon our inner metal element, and just let go of some things. If we need to do this we will try to do it fairly, via consensus-based mechanisms (e.g., online polling processes). We will try to objectively identify priorities via the collective opinions of the group.

Because the group may be large, and time may be short, we will always encourage contributions that are brief and focused. If you are a naturally sociable type who enjoys yakking and doing brainstorming activities, or if you are (like your facilitator) an Earth CF who loves to over-process ideas until they are sweet gooey mush, then try to remember to occasionally ask yourself whether your voice is dominating the discussion, and being heard more than others. Don't be offended if your facilitator hints that it may be time to step back for a while and let everyone contribute.

We will definitely try to have fun! The day may be long, and some of the topics may be challenging to negotiate. But hopefully, by the end of the day we will all feel that we have contributed to something significant, and the college will be better for it.

Information about The Academy

1. Brief History

The Academy was originally founded in 1988, as the *Worsley Institute of Classical Acupuncture* (WICA). The founder of our school was Professor J.R. Worsley himself. Today, we are the only school in the world that can state accurately that we were founded by Professor Worsley. (Note that JR's first school in Leamington, England – the College of Traditional Acupuncture -- was dissolved as a UK company in 2014.)

JR passed away almost 20 years ago in 2003, and next year (2023) will be the 100th anniversary of his birth. An informative and appreciative overview of JR's life and work can be found in a thoughtful tribute written shortly after JR's death in 2003 by one of his longtime students, Allegra Wint. A PDF version of this document is available in the resources section, and it can also be found online at:

<http://www.ejom.co.uk/vol-4-no-3/featured-articles/professor-j-r-worsley-14-september-1923-2-june-2003.html>

Professor Worsley founded WICA with the assistance of his longtime student, Dr Judy Becker. Professor Worsley and Dr Becker subsequently married in 1991, and they ran the school together for the next six years as co-owners. Originally, WICA was established as a for-profit entity. The school was initially based in a rented space in an office complex in Miami Lakes, FL, approximately 20 miles northwest of downtown Miami.

After nine years of operations, WICA reorganized in 1996-97 as a non-profit 501(c)(3) educational institution. The Worsleys were closely involved in the initial planning and creation of the non-profit entity, along with Dorit Reznick, who served first Executive Director. At the same time it converted to a non-profit organization, the college changed its name to Academy for Five Element Acupuncture. The Worsleys and Dorit were among the founder members of the Academy's governing board.

Subsequently, the school relocated to larger rented premises near the ocean, in Hallandale Beach, FL, approximately 10 miles south of Fort Lauderdale. Around this time, the Worsleys negotiated a "termination agreement" with the college. They sold the curriculum to the Academy, but reserved the use of the name "Worsley" and various associated trademarked concepts (such as "Classical Five Element Acupuncture") for themselves.

After the agreement was signed, the Worsleys resigned from the governing board, and subsequently ceased their involvement with the college.

In 2007, after 10 years at the Hallandale Beach campus, the college relocated more than 300 miles north to downtown Gainesville, FL. This followed the purchase of a two story, 23-room, 6,896 sq. ft. office building property designed to serve as the new campus location (305 SE 2nd Ave).

Seven years later, in 2014, a second adjacent 26-room, 8,880 sq. ft. property was purchased (315 SE 2nd Ave). This second property included two distinct buildings. The purchase more than doubled the size of the usable space on campus. Among other improvements, this allowed for the expansion of the clinic. Today, the entire Academy campus includes three separate buildings, 49 rooms (per county records), and a total of 14,676 sq. ft. of usable interior space. The county assessor's office currently (2022) values the two combined properties (its "Just [Market] Value") at slightly under \$1.3 million.

Note that it is distinctly unusual for a small non-profit acupuncture school in the USA to own its own spacious and well-appointed campus!

2. Programs: Licensure and Accreditation

Since its incorporation in Florida as a non-profit organization, the Academy has operated as an independent single-purpose graduate school, overseen by a Board of Governors. The college is currently licensed to grant master's degrees by the State of Florida Commission for Independent Education.

In 1993, the college's "Licentiate in Acupuncture" diploma program, designed by JR and Judy Worsley, received initial "candidate for accreditation" status from the profession's accrediting body (at the time, ACAOM; now ACAHM). Candidacy was achieved while the college was still operating under the WICA name. Five years later in 1998, operating under the Academy's new name, the college's Licentiate program was granted full accreditation by ACAHM.

Florida approved the granting of full master's degrees at the college in early 2003, and soon afterwards the original 27 month Licentiate in Acupuncture diploma program was expanded and replaced with a 36 month Master of Acupuncture (MAc) degree.

Including its initial accreditation, the Academy's Master of Acupuncture program has now been evaluated by ACAHM no fewer than five times: in 1998, 2001, 2005, 2011, and 2017. The length of accreditation awards has improved steadily over time (3, 4, 6, 6, and 7 years, respectively) as the program has matured. This suggests increasing levels of confidence in the Academy's program on the part of the accreditation commission and their evaluators.

In 2001, the college began offering training in Chinese herbal medicine. This followed a change in Florida licensure regulations, which mandated training in herbal medicine as well as acupuncture for anyone seeking licensure in the state. The Academy's Chinese Herbal Medicine certificate program is also now fully accredited by ACAHM. So today, the college offers two fully accredited programs: the MAc degree, and the Chinese Herbal Medicine certificate. Approximately two thirds of students in the MAc classes currently also enroll in the herbs program.

In addition to its MAc and Herbs programs, the college also offers periodic continuing education classes.

3. Strategic Planning History

The Academy has undertaken several formal strategic planning sessions, most recently in 2003, 2010 and 2016. In the past, some of these sessions have been combined with larger faculty meetings (notably in 2010).

The most recent 2016 plan generated a rich and complex document, full of many proposals and projects. The plan eventually included 6 high level "goals", 41 mid-level "objectives", and ultimately a total of 98 lower-level "action items" to be completed. It is provided for reference in the resources section. (We will review the most recent plan, and its accomplishments, in more detail during the planning day.)

The two most recent planning sessions used the common Harvard Business School style approaches to strategic planning. These include "SWOT" analyses (Strengths-Weaknesses-Opportunities-Threats) and brainstorming sessions. If you have never participated in strategic planning activities before, many resources are available online if you would like more information. For example, the following link may be useful as a primer on SWOT analysis: <https://asana.com/resources/swot-analysis>. Additional information is provided in the resources section.

Mention of prior strategic plans requires that we acknowledge the work of our beloved friend, mentor, and colleague Barbara Davis. Barbara was one of the Academy's most enduring supporters. She served as a board member for 15 years (1998-2013) from her home base in Asheville, NC. Barbara also used her legal and mediation skills, and her exceptionally kind and gentle personality to facilitate most of the Academy's strategic planning sessions over the years -- including the last plan completed in 2016. Very sadly Barbara passed away five years ago in 2017. We honor her memory and her many contributions to the college.

<https://www.legacy.com/us/obituaries/citizen-times/name/barbara-davis-obituary?id=11236348>

