



# **Strategic Plan**

(Fiscal Years 2017, 2018, and 2019)

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## **IBHRE OVERVIEW and BACKGROUND**

### IBHRE Overview

Since its inception, the **International Board of Heart Rhythm Examiners (IBHRE)** has placed significant emphasis on the **academic professionalism** and competency of standards of physician and allied healthcare practitioners. Accordingly, the organization has established a solid reputation and is widely regarded as an **international model for competency testing in cardiac rhythm device therapy and cardiac electrophysiology**.

Electrophysiology (EP) and cardiac rhythm device therapy is an expanding subspecialty involving a diverse range of practicing professionals: physicians, nurses, clinical specialists, technologists, physiologists, engineers and scientists. There are targeted educational and competency pathways for physicians, however for the non-physician groups, these educational pathways are varied and remain unique to the individual discipline.

As a **leader in heart rhythm certification**, IBHRE must uphold its reputation and find ways to not only perform well, but effectively engage in planning of the envisioned future through goal-setting and program development by way of:

- Achieving Impact: Making progress toward the organization's goals and delivering measurable results and outcomes
- Setting the Agenda: Defining the organization's vision, mission, specific goals and strategies, leadership structure, and overall approach to its work
- Managing Operations: Monitoring internal/external processes and effectively managing the organization's human and financial resources

### Background

Established in 1985 as NASPEXAM, IBHRE® was the first testing organization founded to **raise the level of professionalism and academic credibility** in cardiac rhythm device therapy and EP. IBHRE offers the following unique certification programs for physicians

and allied professionals designed to demonstrate competency in the worldwide practice of heart rhythm management:

- Certified Cardiac Device Specialist (CCDS)
- Certified Electrophysiology Specialist (CEPS)
- Certified Electrophysiology Specialist – Adult (CEPS-A)
- Certified Electrophysiology Specialist – Pediatric (CEPS-P)

Successful completion of an IBHRE examination certifies that a practitioner has the minimum core knowledge in their respective sub-specialty. Achieving and maintaining IBHRE Certification is validation of a practitioner's **clinical and technical knowledge** in essential areas of practice; **affirmation of a practitioner's ability** to interpret and understand interventions and therapies administered to patients; and a **measure of the critical competencies** essential for safe, optimal care in the management of arrhythmias.

IBHRE has long recognized that **global standardization of knowledge** is critical for the advancement of the heart rhythm profession. IBHRE validates this position through a diverse body of international subject matter experts, the delivery of foreign language examinations, and through representation of its international certified professional-base. More than 9,000 individuals around the world have successfully passed IBHRE exams.

## THE IBHRE STRATEGIC PLAN

IBHRE's **Strategic Plan** is an evolving document generally with a three year life span. The Board's vision and the financial state of the organization may determine what strategic goals take precedence. The strategic plan addresses IBHRE's core values, its desired future, assumptions and opportunities. This document provides a platform to continually improve the organization through the Board's annual identification of strategic priorities, an understanding of the organization's weaknesses and a clear vision of where the organization is headed.

## IBHRE'S CORE IDEOLOGY & ENVISIONED FUTURE

**The core ideology** describes IBHRE's consistent identity that transcends all changes related to its relevant environment. It consists of two elements — **core purpose** — IBHRE's reason for being — and **core values** — essential and enduring principles that guide the organization. **Envisioned future** conveys a concrete yet unrealized vision for IBHRE. It consists of a **bold goal** — a clear and compelling catalyst that serves as a focal point for effort — and a **vivid description** — vibrant and engaging descriptions of what it will be like to achieve the bold goal.

### Mission

**To increase the heart rhythm professional's knowledge in order to improve the quality of care delivered to our patients.**

### Founding Purpose

To **design examinations** for the fields of cardiac rhythm device therapy and cardiac electrophysiology; to **administer examinations** to members of healthcare professions for the purpose of **measuring their skills** in the area of cardiac rhythm device therapy and EP; and to encourage **continuing competency** through education, career enhancement, and professional development.

### Core Organizational Values

- **Excellence**: Reach beyond the norm to conserve the organization's gold standard of excellence in heart rhythm certification; and maintain fairness and integrity in the development, administration and promotion of the certification programs.
- **Visionary Leadership**: Secure strategically robust leaders to guide and protect the organization's interests.
- **Professionalism**: Uphold the highest standards of professionalism; demonstrate transparency and respond effectively to meet the needs of certified professionals, leaders, partners and the public.
- **Continuing Competency**: Encourage continuing competency of the profession through examinations, education and professional development.
- **Collaboration**: Maintain our position of credibility through partner recognition, strategic alliances, and endorsement of the certification programs.
- **Diversity**: Foster development of a diverse community of highly skilled heart rhythm professionals and work to advance heart rhythm management as a global multidisciplinary standard.

### Vision

To become the **global leader** in heart rhythm certification

### Bold Goal

The **preeminent leader** in heart rhythm certification

### Envisioned Future

The following summarizes the aspirations of IBHRE:

IBHRE is the preeminent leader and go-to organization for **standardization and excellence** in heart rhythm certification. IBHRE certification is a **required assessment** for all physicians and allied healthcare professionals involved in the management, treatment and care of patients who suffer from heart rhythm disorders. In the US the IBHRE certification is **mandated** by federal, state and local medical regulatory agencies.

Outside of the US, IBHRE is contracted with all **healthcare ministry authorities** to administer the certification program. Certified professionals benefit from meeting **regulatory requirements, employer recognition, procedural privileges, increased pay and career advances**. IBHRE supports advancement of the profession through **continuing competency, employer/career resources, education programs, active patient networks and strong partnership alliances**. IBHRE strives to forecast and stay on the cutting-edge of the profession by maintaining an **evolving and content-rich** certification program. US and international employers, patients and their healthcare providers refer to IBHRE as a **credible source** for information on critical tasks associated with heart rhythm management, core competencies required of the heart rhythm specialist, and verification of required credentials. Funding is steady as government grants and organizations **world-wide support** the program to confirm its existence for a rapidly growing industry of heart rhythm specialists. Leadership in the organization is **strategically robust** with the expertise, experience and qualities needed to capitalize on the **organization's strengths and opportunities**; and cultivate its weaknesses and threats. As a result of IBHRE's efforts, studies validate that IBHRE certified health-care specialists have **incomparable outcomes** next to non-certifieds in similar specialties. The **scope of knowledge and quality of care** associated with IBHRE professionals' results in a **lower number of deaths** and the **decreased suffering** of patients with heart rhythm disorders.

## **ASSETS, LONG-TERM ORGANIZATIONAL GOALS, TRENDS & ASSUMPTIONS**

### Assets

- **Our People** – diverse pool of world renowned experts in cardiac rhythm device therapy and EP
- **Our Content** – validated – robust – a global standard
- **Our Reputation** – credible – established – exceptional
- **Our Impact** – the international platform for heart rhythm certification

### Long-Term Organizational Goals

- Maximize opportunities to align with strategic goals
- Maintain a financially sound organization.
- Grow examinee base by a minimum of 3% per year
- Reach an overall recertification rate of 80% per year
- Achieve an overall 85% participation rate in Verification of Continuing Education (VCE)
- Maintain at minimum one year of operating expenses in reserves
- Generate non-exam revenue of a minimum of \$50,000 per year
- Recognition by licensure boards/agencies of IBHRE certifications

### External Assumptions

- Importance of qualified heart rhythm professionals in the healthcare system will evolve
- Certification and education process will improve practice, patient safety and outcomes (Market Research Task Force to address this point has been aborted.)
- Allied professional environment is growing
- Internationally the profession is expected to grow
- The funding environment to support professional development programs is under pressure
- New funding opportunities for IBHRE exist
- Stakeholders lack an understanding of the value of IBHRE certification
- Item writers and other content experts will continue to enhance their unique knowledge and skillset

### Internal Assumptions

- IBHRE will engage cost savings strategies
- Operational and personnel costs will increase due to inflation
- Revenues may remain steady (as projected) only if the EP exams for allied professionals and physicians continue to grow

- Vendor costs will be minimized
- Staff must implement new and innovative marketing strategies

Strengths, Weaknesses, Opportunities and Threats

<p style="text-align: center;"><b>Strengths</b></p> <ul style="list-style-type: none"> <li>➤ Overall strength as an organization</li> <li>➤ Positive branding</li> <li>➤ Trust and respect</li> <li>➤ Breadth of knowledge</li> <li>➤ Certification growth</li> <li>➤ Number of years in business (31 years)</li> <li>➤ Link to HRS</li> </ul>	<p style="text-align: center;"><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>➤ Lack of clear organizational priorities</li> <li>➤ Limited staffing</li> <li>➤ Lack of European partners</li> <li>➤ Cost of exam may restrict access</li> <li>➤ Unclear goals for knowledge transition platforms</li> <li>➤ Limited number of volunteer content experts for developing new products</li> <li>➤ Limited resources available to the international heart rhythm organizations</li> </ul>
<p style="text-align: center;"><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>➤ More innovation</li> <li>➤ Engage in transition and rethinking</li> <li>➤ Develop new programs and services</li> <li>➤ Broaden US and international engagement</li> <li>➤ Align programs, personnel and budget with priorities</li> <li>➤ Promote EP physician exam acceptance through appropriate channels and organizations as an equivalent to ABIM certification</li> <li>➤ Expand continuing education programs</li> <li>➤ Expand exams (arrhythmia interpretation, pharmacology, imaging)</li> <li>➤ Obtain patient recognition of IBHRE mission</li> <li>➤ Seek regulatory bodies/mandate of certification</li> <li>➤ Development of web-based education curriculum to align with IBHRE content outlines</li> <li>➤ Implement new marketing strategies</li> <li>➤ Target nurses and other allied professionals in promotional efforts</li> </ul>	<p style="text-align: center;"><b>Threats</b></p> <ul style="list-style-type: none"> <li>➤ Competing exams at lower costs</li> <li>➤ Lack of buy-in from programs for IBHRE EP certification for physicians</li> <li>➤ Inactivity and lack of responsiveness from leaders may erode leadership</li> <li>➤ Minimal knowledge by leadership of program operations</li> <li>➤ Exam security in other countries</li> <li>➤ Economy</li> </ul>

## STRATEGIC GOALS (Fiscal Years 2017-2019)

**Leadership and Excellence:** IBHRE will position itself as the leading certification organization for heart rhythm professionals and reach beyond the norm to conserve the organization's gold standard of excellence in heart rhythm certification.

Governance: IBHRE Board of Directors

Objectives:

- Maintain IBHRE's standing of excellence and global position as a leader in cardiac rhythm device therapy and EP certification.
- Ensure IBHRE exam content remains cutting-edge, relevant, and reflective of best practice and global standards.
- Enhance IBHRE's value and presence in labs, clinics and industry organizations through education, research, and leadership.
- Seek requirements for National Commission for Certifying Agencies (NCCA) accreditation.
- Comply with and renew American National Standards Institute accreditation.

**Organizational Structure and Governance:** IBHRE will ensure its structure, operations and governance model support the growth and administration of its programs.

Governance: IBHRE Board of Directors

Objectives:

- Maintain an effective staff and governance structure to oversee IBHRE operations.
- Continue to improve operations to maintain fairness and integrity in the development, administration and promotion of the certification program.
- Cultivate new IBHRE representatives into IBHRE leadership and governance processes.

**Brand Image and Identity:** IBHRE will reinforce its brand identity as the global leader in heart rhythm certification.

Governance: Ambassadors

Objectives:

- Promote the value of IBHRE certification.
- Utilize the website and social media platforms as educational and promotional tools.
- Offer IBHRE Day to recognize the unique knowledge and skillset of IBHRE certified professionals.
- Introduce new marketing strategies for IBHRE certification with a focus on allied professionals.
- Enhance awareness of IBHRE certification to patient groups.
- Increase awareness of IBHRE exams to international audiences.
- Broaden visibility as an accredited certification entity.

**Strategic Alliances:** IBHRE will foster relationships and encourage collaboration through recognition of affiliate programs, partnerships and strategic alliances.

Governance: IBHRE Board of Directors, Ambassadors

Objectives:

- Continue to strengthen the relationship with the Japanese Heart Rhythm Society and improve collaboration to deliver the CCDS certification exam and VCE process.
- Continue to strengthen relationships with international heart rhythm organizations.
- Advance collaboration and marketing efforts with the Heart Rhythm Society.
- Utilize IBHRE Ambassadors for support in collaborating with other organizations.

**Knowledge Creation and Dissemination:** IBHRE will encourage continuing competency of the profession through examinations, education and professional development.

Governance: IBHRE Board of Directors, IBHRE Ambassadors, Item Writing Committees

Objectives:

- Develop and launch a review course for the CCDS certification exam.
- Utilize social media as an educational tool.
- Offer the IBHRE Scholarship Program to allied professionals.

**Fiscal Management:** IBHRE will manage financial resources, revenues, reserves and investment policies responsibly to advance its strategic goals.

Governance: IBHRE Board of Directors

Objectives:

- Maintain cost-savings test development packages to reinforce long-term savings for the organization.
- Identify and explore new revenue streams.
- Budget fiscal year programs conservatively to meet year-end projections.
- Maintain at minimum one-year of operational costs in long-term reserves.

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