



STRATEGIC PLAN

Approved September 9, 2014

Status Updates June 2016

Table of Contents

Goal 1: Grow, Engage and Retain Member Doctors While Improving Overall Member Satisfaction – Page 2

Goal 2: Maintain and Enhance Advocacy Effort – Page 11

Goal 3: Encourage Our Members to Practice at the Highest Legislated Level – Page 24

Goal 4: Educate the Public on the Importance of Vision and Eye Health and the Role of Doctors of Optometry – Page 30

Goal 5: Improve Communications with Our Members – Page 40

Mission Statement

The mission of the California Optometric Association is to support and advance the profession of optometry to assure quality healthcare for all Californians.

Vision Statement

The vision of the California Optometric Association is that all Californians to utilize a doctor of optometry as their primary eye care provider, collaborating in their overall health care.

Values Statement

The California Optometric Association is committed to promoting the following core values which define, guide and inform our professional association:

| | | | | |
|-----------------|--------------|-----------|---------------|-------------|
| Professionalism | Transparency | Education | Advocacy | Proactivity |
| Innovation | Leadership | Integrity | Collaboration | |

11/15: SP Recommendation: 1) Add the above to tie in one place COA's overriding principles and its related strategic plan. 2) Revise the vision statement to more accurately reflect the public's view of OD's role in patient health care delivery.

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Goal 1: Grow, engage and retain member doctors while improving overall member satisfaction.

Strategy 1: Collect data to determine optometry membership segments.

(See: Strategies 2 and 4 under this goal; and, Goal 5, Strategy 2 in this strategic plan.)

Indicator of Success:

1. Achieve a member retention rate of at least 92%.
2. 2% membership growth (net), 2016; 3% membership growth (net), 2017.

11/15: SP Recommendation: Revise the indicators of success to reflect the anticipated dates of completing the below action items.

Action Item 1: Survey members and non-members to obtain contact and personal and profession demographic information.

Objective Detail:

1. Collect non-member phone numbers and e-mails – Due fourth quarter 2014
2. Data to be collected by the survey to include: mode of practice, age, stage in career, full-time v. partial practice employment, ethnicity, communication method desired, what does the doctor of optometry find/want of value in membership.
3. Send survey developed – Completed for members; due for non-members first quarter 2016.
4. Analyze survey results and organize member and non-member doctors of optometry by segment as defined by the survey – Due fourth quarter 2015 for members, second quarter 2016 for non-members.

COA Staff Lead/Support: Lead: COA Development Manager, COA Membership Coordinator; Support: COA Receptionist, COA Executive Director, COA Communications and Social Media Manager

Due: Fourth quarter 2015 for members, second quarter 2016 for non-members

Status:

11/14: COA Membership Committee working to collect survey samples for consideration in develop a COA member/non-member survey.

2/15: • COA staff has begun calling non-members to obtain current contact information, e.g., e-mail and physical addresses.

• Questions for member survey being finalized and anticipated to be sent the week of February 16.

6/15: • Ordered the most current list of OD licensees from the State Board of Optometry that will be cross-reference to the COA database.

• Survey of members completed that yielded 782 responses.

11/15: • SBO list is currently being cross-referenced with the COA database with an estimated completion date of 9/30/15. Once database is up-to-date, staff will begin researching and adding missing information, such as non-member emails and office phone numbers.

• SP Recommendation: **1)** As action items 1 through 4 represent steps in the process to achieve the ultimate goal of collecting data to determine optometry segments, it seems unnecessary to place each step in a separate action item. Therefore, it is recommended to combine these action items into one; **2)** COA has been using existing staff to collect phone numbers and emails, thus it is recommended to delete the \$9,600 suggested for a temporary

employee to do the same; and, **3)** revise the due dates to reflect the anticipated completion of the relevant action items.

2/16: • COA currently analyzing data collected from member survey for referral to applicable committees.

• COA staff is currently updating member and non-member addresses, emails and phone numbers gathered from annual dues investment billing and non-member membership solicitation mailing conducted in December 2015.

4/16: • COA staff has completed 95 percent of member and non-member contact updates from the December 2015 dues billing and non-member recruitment mailings.

6/16: Next steps discussed on 5/25 COA Membership Committee call - OD emails and phone numbers to be requested from the SBO. If unable to be acquired by the SBO, COA will continue to update our non-member data via Google and Facebook searches.

Action Item 2: Analyze survey results and organize member and non-member doctors of optometry by segment as defined by the survey.

COA Staff Lead/Support: Lead: COA Development Manager; Support: COA Executive Director, COA Membership Coordinator

Resources: COA Membership Committee

Due: Fourth quarter 2015 for members, second quarter 2016 for non-members

Status:

11/15: • Results from members have been compiled and are currently being analyzed.
• SP Recommendation: Extend due date to provide time to complete analysis of member data and update database to survey non-members.

2/16: • COA continuing analysis of member survey data collected for referral to applicable committees.

• Once non-member contact information is updated, a non-member survey will be conducted.

Strategy 2: Market to/offer benefits to specific segments.

(See Strategies 1 and 4 under this goal; and, Goal 5, Strategy 2.)

Indicators of Success:

1. Achieve a member retention rate of at least 92%.
2. 2% membership growth (net), 2016; 3% membership growth (net), 2017.
3. Increased utilization of member programs, e.g., insurance, endorsed programs, member resources and services.

11/15: SP Recommendation: Revise the indicators of success to reflect the anticipated dates of completing the below action items.

Action Item 1: Review current and create new member resources.

COA Staff Lead/Support: Lead: COA Development Manager; Support: COA Executive Director

Resources: COA Membership Committee, COA Sponsored Services Committee; unknown potential financial costs for promotion of new member resources

Due: Second quarter 2016.

Status:

2/15: • COA in discussions with Mercer to offer discounted student loans consolidation and refinancing and defined benefit retirement program particularly attractive to more established doctors of optometry.

- CO in discussions with iMatrix to offer a discounted website and patient marketing/communication portal.
- COA has released its first digital version of *California Optometry*. The new platform offers readers a more interactive experience with numerous resources to utilize within the articles for expanded access to information.

6/15: • COA worked with Mercer to develop a program offering students and doctors college loan consolidation and discounted refinancing to be reviewed by COA Sponsored Services Committee at the of May 2015.

- COA in discussions with SolutionReach for a potential endorsement of its patient scheduling and messaging system.
- Published updated and revised COA 2015 *Optometrist Resource Guide*.
- The *Government Affairs Weekly* email and *COA Member News* e-newsletters have undergone significant layout changes to better appeal to recipients, along with a greater interactive reading experience.

11/15: • In an effort to support new grads and promote the opportunity for all COA members to list classified advertising at no charge, COA encouraged those looking for employment to provide a jobseeker profile that were listed in the classified ad sections of the COA website and *California Optometry* magazine.

- COA partnered with VWI to offer an ICD-10 webinar on 8/27/15 with 182 members (ODs and staff) attending the very positively received webinar. The webinar is available to members on the [education page](#) of the COA website.
- In partnership with Mercer and SoFi, COA will be launching a discounted interest rate student loan consolidation program in the new few weeks.
- SP Recommendation: Revise the due date to reflect the availability of member survey data collected as part of Strategy 1 under this goal.

2/16: Upon completion of member survey analysis, applicable COA committee(s) will explore new or enhanced member benefits and services based on the survey results.

4/16: • With the approval of the 2016 COA budget, staff is working to establish and rollout a new legal resource program in partnership with COA law firm Wilke Fleury.

- The COA *Optometrist Resource Guide* is being updated with a May 2016 release date.

6/16: PDF version of COA's *OD Resource Guide* to be emailed to all members on 6/6/16. New COA Legal Resource Services program to be launched July 2016.

Action Item 2: Market new member resources developed from the results of the survey in Strategy 1 under this goal to members.

COA Staff Lead/Support: Lead: COA Development Manager; Support: COA Communications and Social Media Manager

Resources: COA Membership Committee, COA Sponsored Services Committee, COA societies

Due: Third quarter 2016

Status:

- 6/15:** • Updated and revised COA 2015 *Optometrist Resource Guide* marketed to members through COA Member News and COA social media platforms.
- COA and Warren G. Bender Co., broker of COA-endorsed personal insurance products, produced the first “Insurance Myth Busters” video promo providing members with in-depth perspective on what members should expect from insurance brokers and related WGB services.
- 11/15:** • COA’s e-Membership Mondays e-communication has focused on a member benefit each week, aimed at consistently marketing COA resources and programs, and re-emphasizing the value of AOA/COA membership.
- SP Recommendations: **1)** Clarify the action item that it relates to the development of new member resources developed as a result of the surveys undertaken under Strategy 1 of this goal; **2)** revise the due date to coordinate with the 2016 second quarter due date for the development of these programs.
- 2/16:** Upon completion of member survey analysis, new or enhanced member benefits and services developed based on the survey results will be marketed across all channels.
- 6/16:** New COA Legal Resource Services program to be rolled out via 1) member e-blast, 2) “article” in June 2016 COA Member News and 3) attractive spread in July-August *California Optometry* magazine.

Strategy 3: Create student event held at each school to increase engagement.

Indicator of Success: 2% membership growth (net), 2016; 3% membership growth (net), 2017
11/15: SP Recommendation: Revise the indicators of success to reflect the anticipated dates of completing the below action items.

Action Item 1: Communicate and meet with student leaders and faculty to brainstorm ideas and find what kind of program(s) would provide the most value to students.

COA Staff Lead/Support: Lead: COA Development Manager; Support: COA Executive Director, COA Grassroots Manager

Resources: COA Optometric Student Section, COA Membership Committee

Due: Fourth quarter 2015

Status:

- 11/14:** COA Optometric Student Section planning spring semester events at each school.
- 2/15:** • UCB—Residency panel is being planned to be held in early March; event on negotiations of contracts also being planned and is anticipated to take place in mid-April/May.
- SCCO & WUCO—OD/student casino night networking event being planned for late April; currently soliciting funds from local societies to support the event.
 - SCCO Partnerships Event —Working on confirming a COA-recommended speaker to talk on the topic of practice management or prosthetics.
- 6/15:** • COA representatives met with students at WUCO to confirm moving forward on a panel discussion of business-related topics to be hosted by COA for students in all years.
- UCB and SCCO programs for this fall are in the planning process.
 - To date, COA Student Section has raised \$3,800 to support section events.
- 11/15:** • SCCO resumed planning the OD/student casino night networking event and is targeting Oct/Nov 2015. UCB is looking to partner with the school’s private practice club to host a seminar on contract negotiation.

- Mercer, SoFi and financial planning company they can recommend are open to discussing a half-day practice management seminar that can be held at each school.
 - SP Recommendation: Revise the due date to fourth quarter 2015 to reflect when the first student program planning is anticipated to be completed and the event held.
- 2/16:** • A SCCO/WUCO casino networking event is being planned
- UCB is moving forward on the planning of a practice management seminar.
- 4/16:** • An all-student event was held at SCCO on 3/21/16 that focused on legislative updates presented by Sen. Hernandez, along with a COA student membership overview. The SVOS meeting after COA Legislative Day on 4/20/16 is open to all student attendees; talking points will be presented on converting student to professional membership.
- From a recent summit between COA and the deans of the three California schools and colleges of optometry, several action items were developed to assist students in developing ideas and opportunities for education on the business of operating an optometric practice as well as networking opportunities to expand the students' knowledge and contacts.
- 6/16:** The COA Board of Trustees issued follow-up steps to action items developed at the COA-California schools and colleges of optometry summit that are intended to create a greater partnership between COA and the colleges, as well as put on programs beneficial to optometry students.

Action Item 2: Organize program ideas from Action Item 1, above, and hold student events.

Objective Detail:

1. Coordinate scheduling with schools/colleges and student leaders to avoid exams, etc.
2. Secure necessary personnel, e.g., speakers, board members, other members, local society leadership, sponsor(s).

COA Staff Lead/Support: Lead: COA Development Manager, COA Education and Events Manager; Support: COA Executive Director, COA Grassroots Manager

Resources: COA Optometric Student Section and its individual school/college councils, COA Membership Committee, COA Education and Clinical Practices Committee; estimated financial cost of \$2,000 per student event per college

Due: Prior to the end of the 2016-17 school/college year.

Status:

- 2/15:** • UCB—Residency panel is being planned to be held in early March; event on negotiations of contracts also being planned and is anticipated to take place in mid-April/May.
- SCCO & WUCO—OD/student casino night networking event being planned for late April; currently soliciting funds from local societies to support the event.
 - SCCO Partnerships Event —Working on confirming a COA-recommended speaker to talk on the topic of practice management or prosthetics.

6/15: • To date, COA Student Section has raised \$3,800 to support section events.

- WUCO held event in conjunction with their Private Practice Club on March 18, 2015.

11/15: SCCO resumed planning the OD/student casino night networking event and is targeting Oct/Nov 2015. UCB is looking to partner with the school's private practice club to host a seminar on contract negotiation.

2/16: • A SCCO/WUCO casino networking event is being planned

- UCB is moving forward on the planning of a practice management seminar.

- COA staff and leadership hosted a legislative day at WUCO focusing on the importance of organized optometry.

- UCB co-hosted a contracts seminar.

4/16: • COA staff and leadership hosted a legislative day at SCCO focusing on the importance of organized optometry and COA-AOA membership.

6/16: Ninety-five students attended COA's Legislative Day on 4/20/16. Many attended the hosted reception, followed by the SVOS meeting held that evening.

Strategy 4: Convert non-members to members.

(See Strategies 1 and 2 under this goal.)

Indicator of Success: 2% membership growth (net), 2016; 3% membership growth (net), 2017

11/15: SP Recommendation: Revise the indicators of success to reflect the anticipated dates of completing the below action items, along with Strategies 1 and 2 under this goal.

Action Item 1: Design a membership recruitment campaign.

Objective Detail:

1. Consider an incentive(s) to refer new members.
2. Campaign must be within COA budget.
3. Determine whether a different/separate program should be developed and executed for members in their 30s.
4. Use member and non-member survey data to target segments of the profession.

COA Staff Lead/Support: Lead: COA Development Manager; Support: COA Executive Director, COA Communications and Social Media Manager

Resources: COA Membership Committee, COA BOT, COA House of Delegates (HOD); unknown financial costs

Due: Third quarter 2016.

Status:

11/15: SP Recommendation: **1)** Add to objective detail the referral to and use of member and non-member survey data to create targeted campaigns to identified segments of the profession, and **2)** revise the due date from the third quarter 2015 to 2016 to permit time for survey and data analysis for non-members under Strategies 1 and 2 of this goal (membership recruitment campaigns will be conducted in the intervening period based on information available).

2/16: Development and execution of a recruitment campaign will be the focus of the COA Membership Committee in 2016.

6/16: Project Keep taskforce to launch in Q3.

Action Item 2: Create a consistent non-member communications plan.

Objective Detail: Develop tiered plan based on delinquent vs. a doctor who has never been a member.

COA Staff Lead/Support: Lead: COA Development Manager; Support: COA Communications and Social Media Manager

Resources: COA Membership Committee, COA Optometric Student Section

Due: Third quarter 2016.

Status:

11/15: SP Recommendation: Revise the due date from the first quarter 2016 to the third in recognition of the anticipated date of completion of the non-member survey and related analysis necessary to create this plan.

2/16: Non-members were mailed an invitation to join, an overview of AOA-COA legislative accomplishments and a member benefits guide in December 2015 that, as of January 2016, has generated 25 new members for \$40,985 in dues revenue.

Action Item 3: Create a communications plan based on segments of membership.

Objective Detail:

1. Non-member students contacted by COA Optometric Student Section.
2. Long-term members who drop to be called by board member.

COA Staff Lead/Support: Lead: COA Development Director; Support: COA Communications and Social Media Manager

Resources: COA Membership Committee, COA BOT

Due: Third quarter 2016.

Status:

11/15: SP Recommendation: Revise the due date from the first to the third quarter of 2016 in recognition of the anticipated date of completion of the member and non-member survey and related analysis necessary to create this plan.

2/16: • COA is in the process of selecting a new database that will provide for greatly enhanced capturing of a wide menu of demographic information on members and non-members. It is anticipated that this new software will be implemented by the third quarter of 2016.
• Upon completion of member survey analysis, new or enhanced member benefits and services developed based on the survey results will be marketed across all channels.

Strategy 5: Create leadership training program.

Indicators of Success:

1. Achieve a member retention rate of at least 92%.
2. Enhance the professional prestige of serving on the COA Board of Trustees as measured by an increased number of applicants.

Action Item 1: Recognize member's longevity and leadership service.

(See: Goal 3, Strategy 2, Action Item 1; and, Goal 5, Strategy 1, Action Item 2.)

Objective Detail: Consider using *California Optometry* magazine, COA website, e-COA Member News, etc. to recognize members.

COA Staff Lead/Support: Lead: COA Development Manager; Support: COA Executive Director, COA Membership Coordinator, COA Communications and Social Media Manager

Resources (this could be staff and committee time, financial, etc.) *California Optometry*
Editorial Board, COA Awards Committee, American Optometric Association.

Due: Second quarter 2016.

Status:

2/15: Beginning with the January-February 2015 edition of the digital *California Optometry* magazine, it will spotlight in each issue leaders in our *Membership Spotlight* section of the e-publication.

6/15: The digital *California Optometry* magazine highlights members' leadership and involvement in their communities. Additionally, COA is utilizing a scrolling RSS feed in the magazine to recognize new members individually.

11/15: SP Recommendation: It is anticipated that a proposed leadership development program that will include member recognition components will be presented to the 2015 COA Presidents' Council at its November meeting. Thus, it is recommended that the due date be revised to the second quarter of 2016.

2/16: COA developed the *Society Guide to Recruiting and Sustaining Volunteers* that contains a section on various options for recognizing volunteers for leadership service.

Action Item 2: Update COA society tools and resources content.

Objective Detail: Promote through membership committee liaisons to local societies.

COA Staff Lead/Support: Lead: COA Executive Director; Support: COA Development Manager, COA Communications and Social Media Manager

Resources: COA BOT, COA Societies

Due: Third quarter 2016.

Status:

2/15: • In response to a recommendation made by the 2015 COA Presidents' Council, COA staff investigating COA's existing ability to create web portals for individual societies in which bylaws, governance and operations templates and guidelines (including samples), minutes, etc., can be stored and accessed for society utilization.

• Summaries of "table topic discussions" conducted at the 2015 COA Presidents' Council meeting, containing ideas, information and tips on various aspects of operating a society, were compiled and distributed to meeting attendees.

6/15: • The preliminary objective, or theme, of the 2015 COA Presidents' Council meeting is to "Equip societies to grow and maintain membership."

• COA e-Membership Mondays was launched in 2015 as a short, one-item focus on a COA or AOA membership service or benefit that can be used by societies.

11/15: SP Recommendation: COA is in the process of selecting a new database and website portal that will house the society-related tools and resources as requested by the societies. It is anticipated that this new software will be implemented by the third quarter of 2016. Thus, it is recommended that the due date be revised to that quarter.

2/16: COA developed the *Society Guide to Recruiting and Sustaining Volunteers* unveiled at the 2015 COA Presidents' Council meeting.

Action Item 3: Create leadership development program.

(See Goal 1, Strategy 5, Action Item 1; Goal 3, Strategy 2, Action Item 1; and, Goal 5, Strategy 1, Action Item 2.)

Objective Detail:

1. Consider creation of a task force overseen by COA Membership Committee to develop the program.
2. Identify sponsors for the program.

COA Staff Lead/Support: Lead: COA Executive Director, COA Development Manager; Support: COA Membership Coordinator

Resources: COA Membership Committee, COA Presidents' Council, COA societies, COA BOT; potential financial costs depending on the program developed

Due: Second quarter 2016.

Status:

11/15: SP Recommendation: It is anticipated that a proposed leadership development program will be presented to the 2015 COA Presidents' Council at its November meeting. Thus, it is recommended that the due date be revised to the second quarter of 2016.

2/16: *Society Guide Recruiting and Sustaining Volunteers* was distributed to society leadership as part of the Presidents' Council meeting 2015.

Goal 2: Maintain and enhance advocacy effort.

Strategy 1: Continue to advocate highest level of practice (scope).

(See Goal 3, Strategy 1, Action Item 2.)

Indicator of Success: Pass scope of practice bill 2016.

Action Item 1: Pass scope of practice bill.

Objective Detail:

1. Engage in local legislative outreach to generate support for scope of practice bill.
2. Generate paid and earned media to support passage of scope of practice bill.

COA Staff Lead/Support: Lead: COA Governmental Affairs Director, COA Grassroots Manager; Support: COA Executive Director

Resources: COA Legislation-Regulation Committee, COA lobbyists, COA public affairs firm, COA societies, COA key persons, COA Board of Trustees (BOT), COA House of Delegates (HOD), unknown financial costs

Due: September 2016.

Status:

11/14: • As SB 492 did not pass in 2014 and a new bill will be introduced in 2015 with an unknown bill number, it is recommended to revise the Action Item to read: "Pass scope of practice bill."

- As SB 492 did not pass in 2014 and a new bill will be introduced in 2015, the legislative outreach activities envisioned by this Action Item will occur in 2015. Therefore, it is recommended to revise the Due Date to 2015.
- After analyzing the strengths and weaknesses of SB 492, including comments from key doctors who met with lawmakers/staff, developed worksheet and draft language as a basis for discussions on a new scope of practice bill to be introduced in 2015.
- Met with the deans of the three California schools and colleges to discuss a COA-sponsored scope of practice bill.
- Published an op-ed piece in the *Sacramento Bee* under COA President John Rosten's byline demonstrating the public need for increased scope of practice by doctors of optometry; have responded to media inquiries on this issue.
- COA updated and educated members on scope of practice enhancements at town hall meetings held at several societies.
- Passed Cal-OPAC budget that supports state legislative candidates who support optometry.
- Conducted independent expenditure campaigns in support of state legislative candidates who support optometry.
- Established 2015 COA Legislative Day for April 21 in Sacramento.

2/15: Since November, COA has:

- Developed COA budget and allocated Leg Funds to meet our goals.
- Held numerous meetings with Senator Hernandez and his staff to finalize bill language.
- Met with AOA to get their feedback on the bill language.
- Had bill language reviewed by legal counsel.
- Met with organizations representing opponents to optometrists performing diagnostic testing.

- Met with AOA-recommended consultant to identify possible new strategies to pass this legislation.
 - Identified lawmakers who are a priority for COA.
 - Met with newly elected lawmakers and newly appointed members of the Senate Business and Professions Committee to educate them about the issue and likely provisions in a new bill.
 - Invited lawmakers to tour optometric colleges.
 - Investigated feasibility of establishing immunization course specific to optometry.
 - COA Legislation-Regulation Committee members and staff reached out to past COA Key Persons to identify relationships and encourage involvement.
 - Developed media plan including social media outreach.
 - Prepared standardized responses to likely comments or questions from the media.
 - Reviewed daily articles in the media and responded if appropriate.
 - Drafted editorial related to measles outbreak and optometrists providing immunizations.
- 6/15:** • SB 622 has passed the Senate Business and Professions Committee 9-0, and the Senate Appropriations Committee 7-0 and the Senate floor 33-4.
- Since February, COA has:
 - Finalized bill language.
 - Hired additional lobbyist who previously represented ophthalmology.
 - Organized COA's annual Legislative Day where COA members met with lawmakers to lobby SB 622 and other legislative priorities.
 - Prepared supporting materials for COA's leg day, including talking points and leave behind materials.
 - Drafted, submitted and published two opinion/editorials in support of SB 622.
 - Drafted, submitted and published several letters to the editor from COA members in key legislative districts.
 - Sent Action Alert to COA members and encourage them to draft letters in support.
 - Provided sample letters to past supporting organizations and encouraged them to draft letters in support of SB 622.
 - Requested support from those on the fence last year, including CAPG, hospitals, California Primary Care Association, etc.
 - Arranged for Senator Hill, chair of the Senate Business & Professions Committee, to tour UC Berkeley.
 - Responded to detailed list of opposition concerns that defended key sections of the bill, including lasers and removal of lid lesions.
 - Negotiated amendments to get support of Senate B&P chair, Senator Jerry Hill.
 - Kept optometry colleges informed of changes to the bill and obtained their support in lobbying lawmakers.
 - Met with Republicans to secure bipartisan support.
 - Hired additional part time government affairs staff to research legislative questions that come up.
 - Created appropriations leave behind.
 - Advocated a lower cost estimate from the State Board of Optometry which reduced the cost of SB 622 in recent Appropriations Committee Analysis below the suspense threshold.
 - After Appropriations hearing, coordinated and interview between California *Healthline* and Senator Hernandez that resulted in positive media coverage.
 - Hired GV Ayers to draft language to broaden the drugs allowed in SB 622.
 - Organized local meetings with lawmakers for COA Local Leg Days.
 - Reviewed articles daily in the media addressing COA's effort to expand OD scope of practice.
 - Tweeted and posted comments to news stories that support scope of practice expansion.

- Updated webpage, www.itstimecalifornia.com, the COA website created to generate public support of OD scope expansion.

• Sent a press release after SB 622 passed each senate committee and followed up with phone calls to reporters likely to cover the bill.

11/15: • SB 622 was held in Assembly Business and Professions Committee. It is a two year bill. We have developed a plan to obtain the one or two remaining votes necessary next year. Our focus will be increased grassroots involvement with Republican members of B&P and all Assembly Appropriations Committee members.

• SP Recommendation: **1)** As engaging in local legislative outreach and generating paid and earned media to gain passage of a scope of practice bill, as envisioned in Action Items 3 and 4, respectively, are an integral pieces of the overall strategies for passing scope of practice legislation, it is recommended to combine those action items into this action item. **2)** Change the due date from September 2015 to September 2016 as the bill cannot be considered again until 2016.

2/16: Since November, COA has:

- Strengthened relationships at the grassroots level by arranging COA member attendance at lawmaker holiday parties and other events.
- COA staff provided grassroots training at 10 town hall meetings.
- Met with deans from all three California colleges of optometry to discuss scope expansion.
- Hosted legislative awareness event at Western University for first year students.
- Lobbyists met with Assembly Republican and Democratic leadership to secure support for SB 622.
- Held several lobbying meetings with key lawmakers featuring Dr. David Sendrowski as the clinical expert.
- Arranged for Assembly Member Brian Jones, vice chair of the Assembly Business & Professions Committee, to tour SCCO.
- Revised talking points for local docs.
- Hosted an advocacy webinar about SB 622 for society presidents and COA key person coordinators.
- Identified procedure videos that will help demonstrate to lawmakers what we are proposing.
- Secured Dr. Castillo for one hour CE at COA House of Delegates meeting to educate COA leaders about the importance and benefits of scope expansion.

4/16: Since February, COA has:

- Met with newly appointed committee members to educate them about the issue.
- Developed new leave behind pieces that show the distribution of optometrists vs. ophthalmologists who accept Medi-Cal.
- Arranged 16 meetings between local docs and their lawmakers.
- Purchased updated lists of optometrists and ophthalmologists (including subspecialties) in California to see what arguments we can make in support of SB 622.
- Arranged TV interview in support of SB 622 with COA Sacramento Valley Optometric Society President Dr. Rob Omoto.
- Arranged tour at SCCO for Assembly Member Ling Ling Chan.
- Recognized legislative staff who has been helping support SB 622, Carol Ong, as "Legislative Staffer of the Year."
- Obtained updated data from State Board of Optometry about complaints and malpractice data after each prior scope bills.
- Obtained updated data from insurance broker indicating no increase in malpractice rates after scope expansion.

6/16: Since April, COA has:

- Met with numerous lawmakers.
- Engaged in daily social media outreach.
- Developed a video to respond to specific concerns from Assembly Member Brian Jones.
- Arranged for an editorial in support of SB 622 published in the *Sacramento Bee* from Dr. Omoto.
- Responded to negative editorials in the *Sacramento Bee* and Bakersfield newspapers.
- Arranged for UC Berkeley School of Optometry officials Dr. Flanagan and Dr. Wilmore to come to Sacramento to meet with Assembly Member Rudy Salas, new chair of the Assembly Business and Professions Committee.

Action Item 2: Pass regulations to implement scope of practice bill.

Staff Lead/Support: Lead: COA Governmental Affairs Director; Support: COA Grassroots Manager, COA External Affairs Manager, COA Executive Director.

Resources: COA Legislation-Regulation Committee, COA legal counsel, COA BOT, COA HOD; unknown financial costs

Due: 2018.

Status:

- 11/14:** • As SB 492 did not pass in 2014, a new bill will be introduced in 2015 with an unknown bill number and regulations to implement a bill will be consider after its passage, it is recommended to revise the Action Item to read: "Pass regulations to implement scope of practice bill."
- As SB 492 did not pass in 2014 and regulations to implement a bill will be consider after its passage, it is recommended to revise the Due Date to 2017.
- 11/15:** SP Recommendation: As SB 622 did not pass in 2015 and regulations to implement a bill will be consider after its passage, it is recommended to revise the due date to 2018.

Strategy 2: Help doctors gain access to medical and vision plans and get reimbursed for their services.

(See Goal 3, Strategy 1, Action Item 2 in this strategic plan.)

Indicators of Success:

1. Enforcement of Harkin provider non-discrimination provision of the Affordable Care Act.
2. Eliminate barriers to optometric participation in medical panels.
3. More than 50 percent of profession glaucoma certified and actively treating glaucoma.

Action Item 1: Develop strategies and possible solutions for the access issue.

Objective Detail:

1. Determine what can and/or cannot be done in California to address the access issue.
2. Create a plan of action to help doctors of optometry gain access to medical and vision plans, and narrow networks, e.g., HMOs, ACOs, etc., with full and equal participation and get reimbursed for their services.

5. Hire or contract with a research consultant to complete a study that shows optometry is a cost of care differentiator in order to help gain better access to medical panels.
4. Get doctors of optometry included on more public and private medical panels, including Medi-Cal managed care and Medicare Advantage, as-authorized providers.
5. Strategize/coordinate with AOA on solutions.

COA Staff Lead/Support: Lead: COA External Affairs Manager; Support: COA Governmental Affairs Director

Resources: COA Health Care Delivery Systems Committee, COA BOT, COA HOD, \$70,000 to \$125,000 cost for consultant including travel-related expenses; other unknown potential costs

Due: January 2017.

Status:

11/14: • Contacted Lolita Jacobe from the CA CMS office and Dr. Art Lurvey, Noridian medical director, to notify them that ODs are not listed on the Medicare Advantage provider list and ask how we can fix this. Ms. Jacobe to send a formal inquiry about ODs being left off the Medicare Advantage list to Medicare headquarters and expects an answer within 30-45 days (est. November or December 2014).

- Created a fact sheet that explained details about Medicare Advantage that was published in *e-Governmental Affairs Weekly* and posted on COA website.
- Enlisted COA member to serve as a “test case” to apply for a Medicare Advantage plan panel. Doctors was able to get on Blue Shield PPO Medicare Advantage plan, but was rejected from HMO Medicare Advantage Plan because he is not in an IPA.
- COA representatives brought to the attention of AOA officers and trustees at a meeting the Medicare Advantage issue that resulted in AOA staff health plan legal expert to participate in a core group meeting.

2/15: • Task force established to create a study that will help show optometry is a cost of care differentiator. This data can be used to help ODs gain access to medical panels.

- COA has set up meetings with Medi-Cal and DMHC to discuss optometry's inclusion in medical plans.
- COA Health Care Delivery Systems Committee (HCDS) members Dr. Meng, Dr. Lech, Dr. Woo, and Kara Corches, COA external relations manager, met with the Department of Managed Health Care and Medi-Cal to discuss optometry's role in the health care delivery system.

6/15: • COA legal counsel conducted analysis of statutes governing Medi-Cal Managed Care and advised HCDS Committee that optometry should be included in all of their HMO plans.

- COA HCDS representatives met with Department of Health Care Services Director Jennifer Kent on optometry's exclusion from providing medical eye care in Medi-Cal managed care plans. The director expressed support for COA's concern and, in response to her request, the committee has begun gathering documentation to assist her in making a strong case for optometry inclusion in providing medical eye care under these plans.

11/15: • COA attorneys have responded to DHCS Director Kent's request for the information on the legal authority DHCS has to require Medi-Cal managed care plans to allow doctors of optometry to provide medical eye care to qualified individuals.

- SP Recommendations: **1)** As part developing strategies for greater OD access to panels includes a study, it is recommended that Action Item 3 under this strategy relating to the hiring of a research consultant be combined with this action item; **2)** If the preceding is adopted, it is then recommended to revised the Resources needed for a consultant to reflect an estimated financial figure; **3)** As this issue seems to have attracted the attention of state regulators, i.e.,

DHCS, and action by regulatory agencies can be relatively slow, it is recommended that the due date be revised to January 2017.

2/16: COA initiated and obtained from a consulting firm with unique experience in California's health care delivery system a proposal to conduct research and analysis to determine how to successfully approach the "access" issue.

4/16: Met with consultants to educate them on the steps COA has taken in the past to gain access to managed care plans and worked with them to further refine their proposal.

6/16: COA contracted with California Health Policy Strategies to help develop a plan that will gain access to managed care plans. We held two focus group meetings to learn more about the problems doctors have in accessing panels and what strategies they have tried to get on panels.

Action Item 2: Gain doctor of optometry panel access for government and commercial products, including that ability to treat Medicare Advantage-covered patients.

Objective Detail:

1. Get doctors of optometry included in the list of Medicare Advantage-authorized providers.
2. Strategize/coordinate with AOA on solutions.
3. Educate health plan decision-makers about optometry.
4. Consider legal options to enforce freedom of choice laws for Medi-Cal plans.

COA Staff Lead/Support: Lead: COA External Affairs Manager

Resources: COA Health Care Delivery Systems Committee, COA Legislation-Regulation Committee (if legislation needed), COA societies, COA legal counsel, COA BOT, COA HOD; \$25,000 in travel, booth space and paid advertising to health plan decision-makers, other unknown financial costs (particularly if legal solution pursued).

Due: January 2017.

Status:

11/14: • Contacted Lolita Jacobe from the CA CMS office and Dr. Art Lurvey, Noridian medical director, to notify them that ODs are not listed on the Medicare Advantage provider list and ask how we can fix this. Ms. Jacobe to send a formal inquiry about ODs being left off the Medicare Advantage list to Medicare headquarters and expects an answer within 30-45 days (est. November or December 2014).

- Created a fact sheet that explained details about Medicare Advantage that was published in *e-Governmental Affairs Weekly* and posted on COA website.
- Enlisted COA member to serve as a "test case" to apply for a Medicare Advantage plan panel. Doctors was able to get on Blue Shield PPO Medicare Advantage plan, but was rejected from HMO Medicare Advantage Plan because he is not in an IPA.
- COA representatives brought to the attention of AOA officers and trustees at a meeting the Medicare Advantage issue that resulted in AOA staff health plan legal expert to participate in a core group meeting.
- COA staff reached out to Medi-Cal officials about getting an OD-educator appointed to a Medi-Cal advisory board.
- HCDS Committee task force working with AOA staff researching the feasibility of a study that could show optometry as a cost of care differentiator.

2/15: • COA staff worked with OD educators on their application submissions for appointment to the Medi-Cal Children's Advisory Panel.

- Task force established to create a study that will help show optometry is a cost of care differentiator. This data can be used to help ODs gain access to medical panels.
- 6/15:** • COA legal counsel conducted analysis of statutes governing Medi-Cal Managed Care and advised HCDS Committee that optometry should be included in all of their HMO plans.
- COA HCDS representatives met with Department of Health Care Services Director Jennifer Kent on optometry's exclusion from providing medical eye care in Medi-Cal managed care plans. The director expressed support for COA's concern and, in response to her request, the committee has begun gathering documentation to assist her in making a strong case for optometry inclusion in providing medical eye care under these plans.

11/15: COA attorneys have responded to DHCS Director Kent's request for the information on the legal authority DHCS has to require Medi-Cal managed care plans to allow doctors of optometry to provide medical eye care to qualified individuals.

• SP Recommendations: **1)** As access to government and commercial panels includes Medicare Advantage (and Medi-Cal managed care plans), it is recommended that Action Item 6 under this strategy relating to panel access for ODs to government and commercial products be combined with this action item; **2)** As this action item is complicated and solutions are bound to take time, be the legislative, regulatory and/or legal, it is recommended that the due date be revised from September 2015 to January 2017.

2/16: COA initiated and obtained from a consulting firm with unique experience in California's health care delivery system a proposal to conduct research and analysis to determine how to successfully approach the "access" issue.

4/16: Met with consultants to educate them on the steps COA has taken in the past to gain access to managed care plans and worked with them to further refine their proposal.

6/16: COA contracted with California Health Policy Strategies to help develop a plan that will gain access to managed care plans. We held two focus group meetings to learn more about the problems doctors have in accessing panels and what strategies they have tried to get on panels.

Strategy 3: Maintain independent clinical judgment.

Indicator of Success: Complete and present research to COA Board Trustees.

Action Item 1: Research practice modalities and their impact on independent clinical judgment.

COA Staff Lead/Support: Lead: COA Governmental Affairs Director; Support: COA External Affairs Manager, COA Executive Director

Resources: COA Legislation-Regulation Committee, Public Vision League, COA BOT, COA HOD, COA legal counsel; unknown potential financial costs

Due: September 2017.

Status:

2/15: COA participated in meetings with LensCrafters and other retail establishments about various business models and their impact on independent clinical judgment.

11/15: • COA negotiated a bill, AB 684, which would maintain the independent clinical judgement of doctors of optometry working in a mercantile setting that are legally enforceable.

- COA staff produced a background paper on the branch office rule distributed to the COA Legislation-Regulation Committee's executive committee to be used as a basis for a full committee discussion on this topic in the fall of 2015.

2/16: COA Legislation-Regulation Committee discussed the issue of branch offices and the impact on independent clinical judgment. Further discussion to obtain member input will occur at the COA House of Delegates meeting in February.

Strategy 4: Prohibit third-party-imposed discounts on non-covered services.

Indicator of Success: Doctors of optometry are able to negotiate all contract terms.

Action Item 1: Define the problem facing the optometric profession in terms of third-party-imposed discounts and develop possible solutions to these situations.

Objective Detail:

1. What worked in other states?
2. What may or may not be possible here?

COA Staff Lead/Support: Lead: COA Governmental Affairs Director; Support: COA External Affairs Manager

Resources: COA Health Care Delivery Systems Committee, COA Legislation-Regulation Committee, COA BOT, COA HOD, COA legal counsel; unknown potential costs

Due: November 2016.

Status:

11/14: HCDS Committee task force working with AOA staff researching the feasibility of a study that could show optometry as a cost of care differentiator.

6/15: AOA has sponsored federal legislation to prohibit discounts on non-covered services. During AOA's Advocacy Conference in April, AOA explained that some vision plans have found ways to undermine their state laws that prohibit discounts. For example, under the law, doctors are allowed to opt in to providing a discount on non-covered services. While some state optometric associations were successful in passing a law to prevent discounts on non-covered services, the law had no real effect in those states because all the optometrists opted in to ensure that a competitor optometrist will not gain an advantage.

11/15: • The HCDS Committee has determined that the given difficulty with forced discounts and lack of lab choice for providers, that gaining prohibitions on these practices may require a legislation solution that would be initially recommended by the COA Legislation-Regulation Committee.

• SP Recommendation: Given that the COA HCDS Committee has preliminarily determined that a legislative solution may be required to resolve this issue and, given that COA will be pursuing its scope of practice measure, SB 622, in the 2016 Legislative Session, it is recommended that due date be revised to November 2016.

Action Item 2: Pass legislation to prohibit third-party-imposed discounts.

Staff Lead/Support: Lead: COA Governmental Affairs Director; Support: COA Grassroots Manager, COA External Affairs Manager, COA Executive Director

Resources: COA Legislation-Regulation Committee, COA legal counsel, COA lobbyists, COA BOT, COA HOD; unknown financial costs

Due: September 2017.

Status:

11/14: Discussed at fall 2014 COA town hall meetings potential for legislation to prohibit third-party discounts.

11/15: SP Recommendation: Since scope of practice legislation, SB 622, did not pass, the due date for passing this legislation is recommended to be revised to September 2017.

4/16: AOA is sponsoring along with the American Dental Association HR 3323 that would prohibit third-party-imposed discounts on noncovered services, requirements to participate in a vision plan as a condition for participation in a medical plan and restricting a doctor's choice of a lab. Still early in the federal legislative process, it is unclear what impact the measure would have on California ODs if passed.

Strategy 5: Limit refractions to eye exams performed by eye doctors.

Indicators of Success:

1. Develop plan to frame issue.

2. Pass legislation to restrict refractions to eye exams performed by eye doctors if warranted.

Action Item 1: Outreach to OMDs, pediatricians, school nurses, etc., to demonstrate that vision screenings are inadequate to identify vision and eye health problems.

COA Staff Lead/Support: Lead: COA Governmental Affairs Director; Support: COA Grassroots Manager, COA Communications and Social Media Manager

Resources: COA Health Care Delivery Systems Committee, COA Legislation-Regulation Committee, COA public affairs firm, COA BOT, COA HOD; unknown financial costs

Due: September 2016.

Status:

11/14: As COA-sponsored scope of practice measure did not pass in 2014 and continues to be a priority for 2015, it is recommended to revise the Due date to 2016.

2/15: COA attending hearings and is reaching out to stakeholders on the vision screening issue.

6/15: COA is supporting SB 402, Mitchell, sponsored by the State Board of Optometry that would mandate comprehensive eye exams of children up entering school and every two years thereafter. The measure is pending in the Senate Appropriations Committee.

11/15: • SB 402 did not pass the 2015 Legislative Session and COA is working with the author, Senator Mitchell, in her consideration of its reintroduction in 2016.

2/16: Senator Mitchell decided to not pursue SB 402 in 2016. COA is working with the State Board of Optometry on an interested parties meeting scheduled for February 18 about school screenings and the need for comprehensive eye exams.

Action Item 2: Consider legislative changes to public health code to limit refractions to eye exams performed by eye doctors.

COA Staff Lead/Support: Lead: COA Governmental Affairs Director; Support: COA Executive Director

Resources: COA Legislation-Regulation Committee, COA BOT, COA HOD, COA legal counsel, COA lobbyists; unknown financial costs

Due: September 2017.

Status:

11/14: As COA-sponsored scope of practice measure did not pass in 2014 and continues to be a priority for 2015, it is recommended to revise the Due date to 2016.

11/15: SP Recommendation: Since SB 622, COA's scope of practice legislation, did not pass, the due date for sponsoring this legislation is recommended to be revised to September 2017.

2/16: 1) COA is asking its members to document case examples of patients who met the qualifications for an "exam" on the Opternative website, but who went to an optometrist instead and were diagnosed with a serious eye condition that would not have been detected by an online refraction.

2) COA filed a formal complaint to the State Board of Optometry about Opternative, an online refraction website.

3) COA developed two animated videos to educate the public on the shortcomings of online refractions and what constitutes a comprehensive eye examination by an eye care professional - 1-minute version: <https://www.youtube.com/watch?v=SEtScLmo5a4>; 2-minute version: https://www.youtube.com/watch?v=ld1U_CaIGLM.

Action Item 3: Develop public relations campaign to educate the public on the limits of vision screenings and the value of refractive error diagnosis determined by an eye doctor.

(See Strategy 6, Action Item 3 under this goal; and, Goal 4, Strategy 5, Action Item 4 and Strategy 6, Action Item 2.)

COA Staff Lead/Support: Lead: COA Governmental Affairs Director; Support: COA Grassroots Manager, COA Communications and Social Media Manager

Resources: COA public affairs firm, COA public relations firm, COA societies, COA BOT, COA HOD; \$35,000 annual cost for public relations campaign

Due: June 2016.

Status:

11/14: As COA-sponsored scope of practice measure did not pass in 2014 and continues to be a priority for 2015, it is recommended to revise the Due date to 2016.

6/15: • COA is supporting SB 402, Mitchell, sponsored by the State Board of Optometry that would mandate comprehensive eye exams of children up entering school and every two years thereafter. The measure is pending in the Senate Appropriations Committee.

• COA had published in the May 15, 2015, *San Diego Union-Tribune* and May 16, 2015, *Santa Cruz Sentinel* op-eds calling attention to the limits of vision screenings for children and support for SB 402.

• COA activated its grassroots program to urge doctors of optometry to contact state lawmakers to support SB 402.

11/15: • SB 402 did not pass the 2015 Legislative Session and COA is working with the author, Senator Mitchell, in her consideration of its reintroduction in 2016.

• COA will work with its public relations firm, Burson-Marsteller, to incorporate into the 2016 COA public relations plan a focus on public education on the limits of screening.

- SP Recommendation: As this campaign is anticipated to be largely covered under COA's annual retainer with Burson-Marsteller, it is recommended that the annual cost of the project be reduced to \$35,000.

2/16: COA developed two animated videos to educate the public on the shortcomings of online refractions and what constitutes a comprehensive eye examination by an eye care professional - 1-minute version: <https://www.youtube.com/watch?v=SEtScLmo5a4>; 2-minute version: https://www.youtube.com/watch?v=ld1U_CaIGLM.

6/16: Engaged COA's public relations and public affairs firms to jointly coordinate campaigns to educate the public and stakeholders on the limits of online refractions.

Action Item 4: COA Key Person outreach to generate public policy decision-makers' support for limiting refractions to eye exams performed by eye doctors.

COA Staff Lead/Support: Lead: COA Grassroots Manager; Support: COA Governmental Affairs Director

Resources: COA societies, COA Key Persons, COA Legislation-Regulation Committee, COA BOT, COA HOD; unknown financial costs depending on outreach efforts employed

Due: June 2017.

Status:

11/14: As COA-sponsored scope of practice measure did not pass in 2014 and continues to be a priority for 2015, it is recommended to revise the Due date to 2016.

11/15: SP Recommendation: Since SB 622, COA's scope of practice legislation, did not pass, the due date for sponsoring potential legislation is recommended to be revised to September 2017.

2/16: COA created two videos to educate lawmakers about the problems with online eye exams - 1-minute version: <https://www.youtube.com/watch?v=SEtScLmo5a4>; 2-minute version: https://www.youtube.com/watch?v=ld1U_CaIGLM.

Strategy 6: Maximize pediatric vision benefit.

(See Goal 4, Strategy 6.)

Indicator of Success: Pass bill 24 months from introduction.

Action Item 1: Pass legislation to mandate a comprehensive eye exam for children prior to entering school.

COA Staff Lead/Support: Lead: COA Governmental Affairs Director; Support: COA Grassroots Manager, COA Executive Director

Resources: COA Legislation-Regulation Committee, COA lobbyists, COA public affairs firm, COA societies, COA key persons, COA BOT, COA HOD; unknown financial costs

Due: September 2017.

Status:

11/14: As COA-sponsored scope of practice measure did not pass in 2014 and continues to be a priority, it is recommended to revise the Due date to 2017.

2/15: • The State Board of Optometry has announced plans to introduce legislation in 2015 to require an eye exam before children enter school. COA reviewed the proposal and provided a list of suggested amendments.

• COA attending hearings and reaching out to stakeholders on the children's vision screening issue.

6/15: COA is supporting SB 402, Mitchell, sponsored by the State Board of Optometry (SBO) that would mandate comprehensive eye exams of children up entering school and every two years thereafter. The measure in pending is the Senate Appropriations Committee.

11/15: SB 402 did not pass the 2015 Legislative Session and COA is working with the author, Senator Mitchell, in her consideration of its reintroduction in 2016.

2/16: Senator Mitchell decided to not pursue SB 402 in 2016. COA is working with the State Board of Optometry on an interested parties meeting scheduled for February 18 about school screenings and the need for comprehensive eye exams.

4/16: COA has been participating at stakeholder meetings organized by the SBO to generate input, support and coalition building in anticipation of a 2017 SBO-sponsored measure requiring comprehensive eye examinations for children entering school.

Action Item 2: Establish coalition to support children's vision bill.

Objective Detail: Target legislative and public opinion influential groups, including, but not limited to, California School Nurses Organization (CSNO), the state Parent Teachers Association (PTA), state Department of Education, California Teachers' Association (CTA), Association of California School Administrators (ACSA), California School Boards Association (CSBA).

COA Staff Lead/Support: Lead: COA External Affairs Manager; Support: COA Governmental Affairs Director

Resources: COA societies, COA Legislation-Regulation Committee, COA BOT, COA HOD; unknown financial costs depending on outreach efforts employed

Due: March 2016.

Status:

11/14: As COA-sponsored scope of practice measure did not pass in 2014 and continues to be a priority, it is recommended to revise the Due date to 2016.

2/15: • COA met with representatives from the Healthier Kids Foundation Santa Clara County and Welch Allyn about how children's' vision is being screened in that county.

• COA spoke with members from the California School Nurses Organization and participated in its webinar about school vision screenings.

• COA has been in contact with individual school nurses and provided guidance for implementing the new requirements for children's vision screenings.

6/15: • COA is supporting SB 402, Mitchell, which would mandate comprehensive eye exams of children up entering school and every two years thereafter. In addition to the State Board of Optometry, the legislation's sponsor, COA has recruited the Pan Ethnic Health Network to support the bill. COA continues to reach out to the California Primary Care Association, First 5, Parent Teachers Association and the California Teachers' Association to gain support. The measure is pending in the Senate Appropriations Committee.

11/15: • SB 402 did not pass the 2015 Legislative Session and COA is working with the author, Senator Mitchell, in her consideration of its reintroduction in 2016.

- COA External Relations Manager communicates regularly with the staff from the School Nurses Association, and COA will continue its outreach efforts to other stakeholders.

2/16: Senator Mitchell decided to not pursue SB 402 in 2016. COA is working with the State Board of Optometry on an interested parties meeting scheduled for February 18 about school screenings and the need for comprehensive eye exams.

4/16: COA took part in the first of a series of State Board of Optometry-hosted children's vision coalition meetings. COA staff secured an invitation for two optometry college faculty members to take part in a workshop hosted by the California School Nurses Organization to re-write the school vision screening guidelines.

Action Item 3: Create and implement public relations campaign to educate public and gain support for mandated comprehensive eye exams for children prior to entering school. (See Strategy 5, Action Item 3 under this goal; and, Goal 4, Strategy 6, Action Item 3.)

Objective Detail: Obtain the prevalence of comprehensive pediatric eye exams conducted under Covered California-obtained coverage by California doctors of optometry.

COA Staff Lead/Support: Lead: COA Governmental Affairs Director; Support: COA Grassroots Manager, COA Communications and Social Media Manager

Resources: COA public affairs firm, COA public relations firm, COA societies, COA BOT, COA HOD; \$35,000 annual cost for public relations campaign

Due: March 2016.

Status:

11/14: As COA-sponsored scope of practice measure did not pass in 2014 and continues to be a priority, it is recommended to revise the Due date to 2016.

6/15: • COA is supporting SB 402, Mitchell, that would mandate comprehensive eye exams of children up entering school and every two years thereafter, and had published in the May 15, 2015, *San Diego Union-Tribune* and May 16, 2015, *Santa Cruz Sentinel* op-eds calling attention to the limits of vision screenings for children and support for SB 402.

• COA activated its grassroots program to urge doctors of optometry to contact state lawmakers to support SB 402.

11/15: COA will work with its public relations firm, Burson-Marsteller, to incorporate into the 2016 COA public relations plan a focus on public education on the benefits of comprehensive children's eye exams.

• SP Recommendation: **1)** Add objective detail to ascertain prevalence of pediatric eye exams conducted under Covered California-obtained coverage; **2)** As this campaign is anticipated to be largely covered under COA's annual retainer with Burson-Marsteller, it is recommended that the annual cost of the project be reduced to \$35,000.

4/16: COA took part in the first of a series of State Board of Optometry-hosted children's vision coalition meetings. Coalition agreed that a focus should be to educate parents on the importance of getting their children's eyes examined.

Goal 3: Encourage our members to practice at the highest legislated level.

Strategy 1: Ensure access to continuing education through COA.

Indicators of Success:

1. Use technology to implement other modes of education.
2. Double the number of glaucoma certified optometrists in California (use 2013 as base year).
3. Grow participation at COA continuing education activities annually by 5 percent using 2014 as a base year.

6/15: COA continuing education OD participation has increased 13 percent over 2014 (comparing only OD registrations for OW 2014 against OW 2015; participation increased 18 percent if OW staff registrations are included)

11/15: SP Recommendation: While COA has exceeded the 7.5 percent event participation growth in 2015, which may be due large part to the new format for OptoWest, which was in its first year. And while COA will aim for event participation growth, the 7.5 percent annual increase called for appears very steep; not many businesses grow at that rate annually. It is therefore recommended that the figure be adjusted to 5 percent annually.

2/16: 2015 Monterey Symposium OD attendance exceeded 2014 Monterey Symposium OD attendance by 15%. 2016 OptoWest – Newport Beach OD attendance will exceed 2015 OptoWest – Anaheim OD attendance by at least 17%.

4/16: • 2016 OptoWest Newport Beach attendance exceeded 2015 OptoWest Anaheim OD attendance by 38%.

• On behalf of COA and other partner states, GWCO submitted a proposal to the AOA board of trustees to approve in concept the partnering with GWCO and its state association members in making [AOA EyeLearn](#) (online CE) available to GWCO members. Member states will also submit content to bolster EyeLearn's catalog.

4/16: The AOA board has expressed its conceptual support of making AOA EyeLearn available to state associations and COA is serving on a task force to work out the logistics for implementation of the partnership for AOA board consideration.

6/16: COA staff attended a conference call with AOA and other GWCO members to discuss potentially making AOA EyeLearn available to state associations. In addition, staff has explored the World Continuing Education Alliance (World Council of Optometry) and its learning management system.

Action Item 1: Explore industry partnerships to increase access to optometric education.

Objective Detail:

1. Creatively expand industry partnerships, including, but not limited to, education and certifications.
2. Work with partners to provide benefits to doctors of optometry who are certified and/or practicing at the highest legislated level.

COA Staff Lead/Support: Lead: COA Development Manager; Support: COA Education and Events Manager

Resources: COA Sponsored Services Committee, COA Education and Clinical Practice Committee

Due:

1. Expand industry partnerships: Monterey Symposium 2014.
2. Establishment of educational or other benefit partnerships: 2016.

Status:

11/14 • COA staff met with the proprietor of OptSpace, an online learning platform, to conduct preliminary exploration of offering online continuing education on non-continuing education classes to doctors and staff through a third-party vendor.

2/15: • COA has met with several COA affinity partners about creating webinars and/or videos to educate doctors of optometry on various business aspects of practice, e.g., risk management, cash management, asset protection, etc.

• The COA Education and Clinical Practice Committee suggested partnering with schools to use available production rooms to produce and record various education for optometrists and optometric staff.

• COA has reached out to optometry school deans to be featured in the *California Optometry* magazine. Also, COA has asked for assistance in utilizing residency school students to contribute continuing education articles.

6/15: • Drs. Melton and Thomas are confirmed to present a continuing education (CE) course at the 2015 Monterey Symposium through a partnership with *Review of Optometry*.

• 2015 Monterey Symposium will feature eight sponsor “showcase” opportunities inside the exhibit hall. Industry partners will have 30 minutes to present their materials and some presentations will tentatively qualify for .5 CE credit (pending COPE standards revision/approval).

• Several companies have been recruited to present “Food for Thought” programs on various aspects of the practice of optometry at the 2015 Monterey Symposium.

• COA has had a preliminary meeting with VSP representatives relative to making available to doctors and their staff on-line or webinar education programs, including EHR, billing and coding and best business practices.

11/15: • COA is exploring potential partnerships with two entities through GWCO to deliver online educational programs for doctors and staff.

• COA partnered with Vision West to offer ODs and their staff a webinar on how to transition to ICD-10 codes.

4/16: • COA is working with Vision West to establish a practice management program for members.

• COA is serving on a task force to work out the logistics for implementation of a partnership with AOA to make the online educational portal and courses of EyeLearn available to members.

6/16: COA staff participated in a conference call with AOA and other GWCO members to discuss potentially making AOA EyeLearn available to state associations. In addition, staff has explored the World Continuing Education Alliance (World Council of Optometry) and its learning management system.

Action Item 2: Explore programs/classes to teach optometrists to implement advanced practice procedures and practice management strategies.

(See Goal 2, Strategy 1.)

Objective Detail:

1. Collaborate and partner with the appropriate groups to develop curriculum and advanced procedures objectives.
2. Explore other industry groups (Vision West, PEN, AOA etc.) and other learning environment options.

COA Staff Lead/Support: Lead: COA Education and Events Manager

Resources: COA Education and Clinical Practices Committee, California schools and colleges of optometry; potential financial costs through revenue sharing with other groups

Due: Second quarter 2017.

Status:

11/14: • Obtained grant from Alcon to help underwrite several courses at 2014 COA Monterey Symposium to provide doctors and their staff with tools to treat glaucoma in a clinically and financially successful manner.

- Recruited several companies to present a record eight “Food for Thought” classes on various aspects of the practice of optometry at 2014 COA Monterey Symposium.
- COA staff met with the proprietor of OptSpace, an online learning platform, to conduct preliminary exploration of offering on-line continuing education on non-continuing education classes to doctors and staff through a third-party vendor.
- COA conducting a search for a new database solution that can host an online learning environment.
- Published article in October edition of *Governmental Affairs Weekly* on the steps for obtaining glaucoma certification.

6/15: • Drs. Melton and Thomas are confirmed to present “Current Trends in Medical Management continuing education (CE) course at the 2015 Monterey Symposium through a partnership with *Review of Optometry*.

- 2015 Monterey Symposium will feature eight sponsor “showcase” opportunities inside the exhibit hall. Industry partners will have 30 minutes to present their materials and some presentations will qualify for .5 CE credit (pending COPE standards revision/approval).
- Several companies have been recruited to present “Food for Thought” programs on various aspects of the practice of optometry at the 2015 Monterey Symposium.
- COA has had a preliminary meeting with VSP representatives relative to making available on-line or webinar education programs, including EHR, billing and coding and best business practices.

11/15: The 2015 COA Monterey Symposium features numerous classes on advanced glaucoma treatment options, strategies for practice success under health care reform and managing third-party relationships.

2/16: 2016 COA HOD meeting will feature one-hour CE class on advanced procedures, including office-based lesion removal and lasers.

- 2016 OptoWest programs offer three hours each of glaucoma classes.

4/16: • 2016 Monterey Symposium will feature an advanced procedures course on “Lids and Lesions,” four hours of practice management courses and six hours of glaucoma CE.

- COA is exploring presenting a course on in-office lesion removal and lasers in the San Francisco Bay Area as part of a grassroots training initiative to generate active support of COA-sponsored SB 622 which would allow ODs to perform the procedures taught in the class.

Strategy 2: Recognition of certified doctors.

(See: Goal 1, Strategy 5, Action Item 1; and, Goal 5, Strategy 1, Action Item 2.)

Indicator of Success: Double the number of glaucoma-certified optometrists in California (use 2013 as base year).

Action Item 1: Create a system to easily identify the highest level(s) of certified optometrists.

Objective Detail:

1. Create a website badge for certified optometrists.
2. Explore COA recognition of certified doctors at meetings and events.

COA Staff Lead/Support: Lead: COA Development Manager, COA Communications and Social Media Manager; Support: COA Education and Events Manager, COA Membership Coordinator

Resources: COA Membership Committee, COA Education and Clinical Practices Committee

Due: 2016.

Strategy 3: Expand distance learning offerings.

Indicators of Success:

1. Use technology to implement other modes of education.
2. Grow participation at COA continuing education activities annually by 7.5 percent using 2014 as a base year.

Action Item 1: Provide access to distance learning lectures/presentations.
(See Strategy 4, Action Item 1 under this goal.)

Objective Detail:

1. Videotape and/or audio-record select lectures at COA events and meetings.
2. Host lectures on COA website or link to hosted website through COA website.
3. Explore partnerships to offer distance learning opportunities.
4. Explore bundling on-site and distance learning hours to create a continuing education package for doctors.

COA Staff Lead/Support: Lead: COA Education and Events Manager; Support: COA Communications and Social Media Manager

Resources: COA Education and Clinical Practices Committee; unknown financial costs for speaker compensation and website placement of recordings

Due: 2017.

Status:

11/14: • COA staff met with the proprietor of OptSpace, an online learning platform, to conduct preliminary exploration of offering online continuing education on non-continuing education classes to doctors and staff through a third-party vendor.

• COA conducting a search for a new database and website solutions that can host an online learning environment.

2/15: • COA has met with several COA affinity partners about creating webinars and/or videos to educate doctors of optometry on various business aspects of practice, e.g., risk management, cash management, asset protection, etc.

• The COA Education and Clinical Practice Committee suggested partnering with schools to use available production rooms to produce and record various education for optometrists and optometric staff.

6/15: COA has had a preliminary meeting with VSP representatives relative to making available on-line or webinar education programs, including EHR, billing and coding and best business practices.

11/15: • COA is exploring potential partnerships with two entities through GWCO to deliver online educational programs for doctors and staff.
• COA partnered with Vision West to offer ODs and their staff a webinar on how to transition to ICD-10 codes.
• SP Recommendation: **1)** It is recommended to revise the action item to provide access to “distance learning” formats as “videotaped and/or audio recorded” are too limiting; and, **2)** there are many factors involved in achieving this action item, including hosting it in-house or contracting with a third party. Additionally, content needs to be considered in accomplishing this action item. Therefore, it is recommended that the due date be revised to 2017.

4/16: • On behalf of COA and other partner states, GWCO submitted a proposal to the AOA Board of Trustees, which was approved in concept, the partnering with GWCO and its state association members in making [AOA EyeLearn](#) (online CE platform) available to GWCO members. Member states will also submit content to bolster EyeLearn’s catalog. COA is serving on a task force to work out the logistics for implementation of the partnership for AOA board consideration.

6/16: COA and other partner states convened via conference call to discuss with AOA the practicalities involved in making AOA EyeLearn available to GWCO members. Additionally, COA staff participated in a demo with the World Continuing Education Alliance to learn more about their online continuing education management system.

Action Item 2: Explore the viability of increasing the number of continuing education credits (hours) an optometrist can obtain through distance learning.

Objective Detail: Work with appropriate groups to influence and increase the number of distance learning hours an optometrist can obtain.

Staff Lead/Support: Lead: COA Government and External Affairs Director, COA Executive Director; Support: COA Education and Events Manager

Resources: COA Legislation-Regulation Committee, COA BOT, COA lobbyists

Due: 2017.

Strategy 4: Develop resources to guide doctors on various aspects of the practice of optometry.

Indicator of Success: Use technology to implement other modes of education.

Action Item 1: Quick and easy to understand references for Drug Enforcement Administration (DEA), Clinical Laboratory Improvement Amendments (CLIA), insurance panels, Accountable Care Organizations (ACOs), staff training, etc.
(See Strategy 3, Action Item 1 under this goal.)

COA Staff Lead/Support: Lead: COA External Affairs Manager; Support: COA Executive Director, COA Membership Coordinator, COA Communications and Social Media Manager

Resources: COA Health Care and Delivery Systems Committee, COA Membership Committee; potential unknown costs for outside consultant to develop resources

Due: 2017.

Status:

11/14: • Created a step-by-step guide explaining how to update OD DEA registrations to include Schedule II narcotics. Guide was successful as many ODs utilized it and have already received new DEA certificate in the mail, which includes Schedule II drug prescribing authority
• Published a fact sheet on how Medicare Advantage was organized..

2/15: • COA has produced a fact sheet on the new California mandatory sick leave law.
• Article published in COA *Government Affairs Weekly* on the importance of encrypting patient data to protect practices from HIPAA fines.

6/15: Article published in COA *Governmental Affairs Weekly* providing a step-by-step guide to getting on medical and vision panels.

11/15: •COA developed fact sheets providing doctors and their staff with information, tools and resources to transition to ICD-10 codes.

• COA updated its comprehensive and very popular *Optometrist Resource Guide*.
• SP Recommendation: COA has been producing various guides and references for various government programs and insurance practices related to the practice of optometry, and will continue to do so. Though not stated in this action item, the indicator for success for the overall strategy is the use of technology to implement other modes of education. As mentioned under Strategy 3, Action Item 1, above, there is much to consider in implementing various forms of technology to deliver education. Therefore, it is recommended that the due date be revised to 2017.

6/16: COA updated its popular *Optometrist Resource Guide* which has been printed for students and has been placed on the COA website as a member-only resource.

Goal 4: Educate the public of the importance of vision and eye health and the role of doctors of optometry.

Strategy 1: Enhance COA website user experience and exposure to public.

(See Strategy 3, Action Item 1 under this goal; and, Goal 5, Strategy 2, Action Item 3.)

Indicator of Success: Increase the traffic and visitor time on the COA public website.

Action Item 1: Enhance search engine optimization (SEO) to drive optometric related searches to coavision.org and eyehelp.org.

(See; Goal 5, Strategy 2, Action Items 2 and 3; and, Strategy 3, Action Item 1 under this goal.)

Objective Detail:

1. Better integrate SEO into website redesign.
2. Pursue SEO tools to drive public exposure.

COA Staff Lead/Support: Lead: COA Communications and Social Media Manager, COA Network Administrator

Resources: COA Board of Trustees (BOT), COA House of Delegates (HOD); estimated \$3,500 to \$5,000 annual cost for SEO tools, e.g., Google Ads, etc.

Due: Third quarter 2016.

Status:

11/14: • COA conducting a search for a new website solution that features the broad SEO applications.
• The new *California Optometry* magazine, to be launched in January 2015 in digital format, will integrate SEO in every way possible.

2/15: The platform used to publish the new digital format of *California Optometry* has built in tools to maximum SEO, such as word and phrase search, readership demographic analytics, measure individual article popularity, etc. Use of this platform has shown that the inaugural issue of the e-magazine reported 6,305 total views with 1,057 unique viewers.

6/15: The *California Optometry* magazine webpage is the sixth result when Google searching “California Optometry.” SEO will continue to grow as the digital magazine becomes more established.

11/15: SP Recommendation: COA is in the process of selecting a new database and website portal that will “talk” to each other and, the website will have more advanced tools for raising SEO based upon what is clicked on. It is anticipated that this new software will be implemented by the third quarter of 2016. Thus, it is recommended that the due date be revised to that quarter.

6/16: COA has selected a new database portal and has started process for database migration, which will be completed in 2017. COA will embark on a new website design and host after that process is complete.

Action Item 2: Enhance “Find an Eye Doc” OD listings

Objective Detail:

1. Improve ease of use.

2. Expand OD listings: Allow for additional content and functionality, including, but not limited to, multiple office listings, photographs, link to practice website, listing of doctor's certification(s).
3. Consider a fee for some of the additional content listed in "2," above.

COA Staff Lead/Support: Lead: COA Communications and Social Media Manager; Support: COA Development Manager, COA Membership Coordinator

Resources: COA Membership Committee, COA Communications Committee, COA Health Care Services Delivery Committee

Due: Fourth quarter 2016.

Status:

11/15: SP Recommendation: COA is in the process of selecting a new database and website portal that will "talk" to each other and, the website will have more advanced tools for populating a doctor's listing. It is anticipated that this new software will be implemented by the third quarter of 2016. Thus, it is recommended that the due date be revised to fourth quarter of 2016.

6/16: COA has selected a new database provider which includes updated algorithms that will enhance the search function and more accurately display distances to a doctor for the user.

Strategy 2: Enhance content of COA public website.

(See: Goal 5, Strategy 2, Action Item 3; and, Strategy 5 under this goal.)

Indicator of Success: Increase the traffic and visitor time on the COA public website.

Action Item 1: Enhance COA website content that is beneficial to the public.

Objective Detail: Generate optometric-related content valuable to the public.

COA Staff Lead/Support: Lead: COA External Affairs Manager; Support: COA Communications and Social Media Manager

Resources: COA Health Care Delivery Systems Committee; American Optometric Association (AOA), schools and colleges of optometry, COA public relations firm

Due: 2017.

Status:

11/15: The "Learn About Your Vision" page on COA's website has been enhanced with the addition of various eye conditions and educational pieces on the importance of preventive care.

2/16: • COA developed two animated videos to educate the public on the shortcomings of online refractions and what constitutes a comprehensive eye examination by an eye care professional - 1-minute version: <https://www.youtube.com/watch?v=SEtScLmo5a4>; 2-minute version: https://www.youtube.com/watch?v=ld1U_CaGLM.

• The COA Communications Committee has authored bi-monthly blogs, posted to the COA website, to educate the public on various vision and eye health-related matters.

4/16: The COA Communications Committee increased the number of blog posts for 2016, some of which will be written by students, to further educate the public on various vision and eye health-related matters.

Action Item 2: Establish a system to obtain and post to COA website vision and eye health information published by the media and other sources.

COA Staff Lead/Support: Lead: COA Communications and Social Media Manager; Support: COA External Affairs Manager, COA Governmental Affairs Director

Resources: COA Health Care Services Delivery Committee, COA Communications Committee, COA public relations firm, AOA, schools and colleges of optometry, COA BOT, COA HOD; potential financial costs for a news feed service

Due: 2017.

Status:

11/14: COA conducting a search for a new website solution that features the ability to incorporate these applications.

11/15: COA is in the process of selecting a new website portal that will have more advanced tools.

Action Item 3: Educate and equip patients to advocate for doctor's issues using COA website.

Objective Detail: Generate public support for doctors of optometry access to panels.

COA Staff Lead/Support: Lead: COA Governmental Affairs Director; Support: COA External Affairs Manager, COA Communications and Social Media Manager

(See Strategy 1, Action Item 1 under this goal; and, Goal 2, Strategy 5, Action Item 3 and Strategy 6, Action Item 3.)

Resources: COA Health Care Delivery Systems Committee, COA societies, COA public affairs firm

Due: 2017.

Status:

2/15: COA alerted member doctors of patient letters placed on the COA website for them to advocate for the restoration of adult Medi-Cal benefits.

6/15: COA alerted member doctors of patient letters placed on the COA website to advocate for the passage of SB 402, which would mandate children receive a comprehensive eye exam before entering school and every two years thereafter; and, SB 622, which would expand the range of services available to the public from doctors of optometry.

11/15: • COA is conducting a public education campaign on diabetes, and will launch a similar campaign on children's vision and the reserving of refractions to eye doctors in 2016. All campaigns will lead to the COA website with the goal of increasing public traffic. The homepage will contain links to public policy issues important to the profession and lead the public to advocate using COA's online tools.

• COA is in the process of selecting a new website portal that will have more advanced tools for increasing SEO and related public visits to the COA website. The result is anticipated to be more visits to the COA website, exposure to public policy issues important to the profession and advocacy of those matters using COA's online tools.

2/16: COA developed two animated videos, made available to members to share with their patients, to educate the public on the shortcomings of online refractions and what constitutes a comprehensive eye examination by an eye care professional - 1-minute version:

<https://www.youtube.com/watch?v=SEtScLmo5a4>; 2-minute version:

https://www.youtube.com/watch?v=ld1U_CalGLM.

4/16: COA's e-newsletters have featured a link to an interactive e-form on the COA website for doctors to document case examples of patients who met the qualifications for an online "exam" but who went to an optometrist instead and were diagnosed with a serious eye condition that would not have been detected by an online refraction.

Strategy 3: Increase doctor of optometry use of and presence on social media.

(See: Goal 5, Strategy 2, Action Item 2; and, Strategy 1, Action Item 1 and Strategy 5 under this goal.)

Indicators of Success:

1. Increase the traffic and visitor time on the COA public website.
2. Increase doctor of optometry media appearances.
3. Increase doctor of optometry social media involvement.
4. Increase Facebook likes: by 3,000 in first year; by 2,000 in second year; by 2,000 in third year.
5. Double blog page views in one year.
6. Increase COA LinkedIn group to 25 percent of COA members in 12 months.

Action Item 1: Increase use of COA social media by doctors of optometry and the public.
(See Strategy 1, Action Item 1 under this goal.)

Objective Detail: Enhance search engine optimization to drive traffic and use of COA social media portals that result in:

- Double views of COA weekly blogs by the public.
- Increased public engagement on COA Facebook, Twitter, YouTube and other COA social media outlets.
- Increase number of COA members as members of the COA LinkedIn group.

COA Staff Lead/Support: Lead: COA Communications and Social Media Manager

Resources: COA Communications Committee, *California Optometry* Editorial Board, COA public relations firm

Due: 2016.

Status:

11/14: Since July 2014, Facebook likes have increased 40%, Twitter followers have increased 12% and there have been 2,466 YouTube views.

2/15: • COA Vision Blog pageviews have risen 2,215 since 2013 reaching 27,805 pageviews. COA Facebook likes have grown from 1,004 in the 2011 year of inception to 8,464.

- COA Twitter followers have increased from 572 in 2011 to 3,954, and by 1,259 over 2013; @COA_Vision is averaging 338 more daily impressions than 2013.
- COA Vision Blog pageviews have risen 2,215 since 2013 reaching 27,805 pageviews.
- COA YouTube channel has jumped from 3,759 views in 2011 to 11,543 2014 views.
- Since June 7, 2014, LinkedIn has drawn 403 members participating.
- For 2014, more than 1,000 COA members took advantage of the messaging on the COA Member Media Center page monthly.

6/15: • COA Vision Blog pageviews have risen 3,284 since 2014 reaching a total 31,089 pageviews.

- COA Facebook likes have grown from 1,004 in the 2011 year of inception to 10,179.
- COA Twitter followers have increased from 572 in 2011 to 4,374; @COA_Vision is averaging 19,500 daily impressions and about 50 new followers per month.
- COA YouTube channel has already received 2,599 views in 2015.
- Traffic to the COA Member Media Center, which provides optometric-related messaging for practices, has decreased slightly from 190 average monthly pageviews to 145 monthly pageviews.
- The *California Optometry* e-magazine has generated 4,129 unique pageviews. CE tends to be the most popular article.

11/15: As of August 2015:

- COA Vision Blog pageviews have been slightly slower, but still increased to 33,105 total views.
- COA Facebook likes have grown from 1,004 in the 2011 year of inception to 11,151.
- COA Twitter followers have increased from 572 in 2011 to 4,570; individual tweets average about 400 impressions per tweet.
- COA YouTube channel is at 3,640 views, down from 2014.
- Traffic to the COA Member Media Center, which provides optometric-related messaging for practices, has remained fairly consistent with an average of 160 monthly pageviews. Ideally, this page will become more robust with the launch of a new website.
- The *California Optometry* e-magazine has generated 8,420 unique pageviews. Top articles include ICD-10, CE and "The War Against Head Injuries."
- SP Recommendation: As Action Items 2 and 3, like this action item, essentially call on overall increased traffic to and engagement on COA's social media platforms by doctors and the public, it is recommended that they be combined.

2/16: As of January 2016:

[COA Vision Blog](#): Page views and visitors decreased by about half in 2015 due to a decision by the communications committee to reduce the number of blogs to lessen the burden on the committee members. Page views decreased from 14,964 in 2014 to 8,931 in 2015. Visitors decreased from 10,732 to 5,597. However, views per visitor increased from 1.39 to 1.60, meaning the people visiting the blog are spending more time.

- [Facebook](#) and [Twitter](#): Promotion in conjunction with Burson-Marsteller has driven Facebook likes from 1,004 (2011) to 12,469. COA's Twitter page, @COA_Vision has grown to 5,601 followers, an increase of 1,107 since 2014.
- [YouTube](#): COA's YouTube channel has yielded more than 37,300 total views with 112 subscribers. 2015 generated more than 12,000 views featuring President's Minute videos, educational and legislative videos, and much more
- [The COA Student Section Group \(COSS\)](#): The COSS group on Facebook has 476 members up from 315 in February 2015. In the closed COSS group, students can share interesting articles and facts to help them in their studies and upcoming careers.
- [Member Media Center](#): The member-only Member Media Center resources, offering timely content for members to use in their newsletters and social media, was recently re-launched and dozens of members have taken advantage of the content since its launch. The communications committee is working to spread the word about the resources available to members.
- [Pinterest](#) was actively promoted on all social media to bring the following to 134 users with 1,300 pins.
- [LinkedIn](#) has drawn 408 members participating in optometry-related discussion. This community serves as a more doctor-targeted appeal, but is available for viewing by the public.

4/16:

- [COA Vision Blog](#): Page views and visitors decreased by about half in 2015 due to a decision by the communications committee to reduce the number of blog posts to lessen the burden on the committee members. More recently, committee decided to raise the number of blog posts, which will include blogs from students.
- [Facebook](#) and [Twitter](#): Promotion in conjunction with Burson-Marsteller has driven Facebook likes from 1,004 (2011) to 13,005. COA's Twitter page, @COA_Vision has decreased slightly to 5,152 followers since February of this year.
- [YouTube](#): COA's YouTube channel has yielded more than 37,964 total views with 113 subscribers. 2015 generated more than 12,000 views featuring President's Minute videos, educational and legislative videos, and much more.
- [Member Media Center](#): Member Media Center (MMC) featured information about cataracts and online eye exams for the first part of 2016.

MMC Eblast statistics:

- Open rate – 30% (average)
- Click-through rate – 12% (above average)
- 25 people clicked through to the MMC
- Almost 200 people clicked to watch our online eye exams (Opternative) video.

6/16:

- [COA Vision Blog](#): Page views and visitors have increased in 2016 due to increasing the number of blogs by recruiting students to write for the blog.
- [Facebook](#) and [Twitter](#): Promotion in conjunction with Burson-Marsteller has driven Facebook likes from 1,004 (2011) to 13,022. COA's Twitter page, @COA_Vision has increased to 5,350 followers since April (5,152).
- [YouTube](#): COA's YouTube channel has yielded more than 38,910 total views with 114 subscribers.
- [Member Media Center](#): Member Media Center (MMC) featured information about Spring allergies in spring 2016.

MMC Eblast statistics:

- Open rate – 28% (below average)
- Click-through rate – 9% (below average)
- 30 people clicked through to the MMC

Strategy 4: Standardization of COA image with members, e.g., branding.

Indicator of Success: Expand the branding of COA as the professional association for doctors of optometry before the public as measured by use of COA-member identifying tools and materials.

Action Item 1: Create COA window sticker/counter sign.

Objective Detail:

1. Reference Eyehelp.org on sticker/sign.
2. Consider placing on sticker/sign an indication of membership value, e.g., "Proud COA Member."

COA Staff Lead/Support: Lead: COA Development Manager; Support: COA Membership Coordinator

Resources: COA Membership Committee; unknown financial costs for production and mailing of sticker/sign.

Due: 2016.

Strategy 5: Public education of COA events/health topics.

(See: Goal 1, Strategy 4, Action Item 2, Goal 5, Strategy 2, Action Item 3; and, Strategy 2 under this goal.)

Indicators of Success:

1. Increase the number of patients seen at COA eye health fairs.
2. Increase doctor of optometry media appearances.

Action Item 1: Assist COA societies in hosting health fairs and participating in those hosted by third parties.

Objective Detail:

1. Invite legislators to attend health fairs.
2. Promote and encourage coverage of health fairs at which COA or societies host/participate by print, television, radio and online media.
3. Invite local community groups to participate at health fairs.
4. Assist societies in identify health fairs in their area in which they could participate.

COA Staff Lead/Support: Lead: COA Grassroots Manager; Support: COA Communications and Social Media Manager, COA Governmental Affairs Director

Resources: COA Societies, California Vision Foundation, local community groups; unknown costs for shipping optometric equipment to societies for use in participating at health fairs.

Due: 2017.

Status:

11/15: SP Recommendation: For the past three years, COA has been hold health fairs to which local lawmakers are invited, as well as media and community groups, e.g., fire departments, etc. COA has also acquired portable lanes and other equipment for staging health fairs and which is available to COA societies. The number of patients seen is driven by the number of doctors willing to volunteer and lanes available. As this is an ongoing activity of COA, it does not appear to rise to level of a strategic plan action item. Therefore, it is recommended to **1)** revise this action item to instead have COA assist societies in holding their own or attending health fairs sponsored by others; and, **2)** revise the due date to 2017.

2/16: COA assisted COA Santa Clara County Optometric Society with its upcoming April 2016 participation at local community health fair, including providing lanes of equipment.

Action Item 2: Create a calendar with health-related topics/events.

Objective Detail: Post calendar to COA website COA society websites and social media outlets.

COA Staff Lead/Support: Lead: COA Grassroots Manager; Support: COA Development Manager, COA Membership Coordinator, COA Communications and Social Media Manager

Resources: AOA, COA societies, California schools and colleges of optometry, COA public relations firm

Due: 2016.

Status:

11/14: COA conducting a search for a new website solution that features the ability to house these functions.

11/15: • COA places on its website calendar health-related events taking place at California-located optometric colleges and societies as that information becomes available.

• COA is in the process of selecting a new website portal that will more effectively allow COA to capture and post on a calendar health-related events.

Action Item 3: Promote and/or participate in national/state/local health-related events.

COA Staff Lead/Support: Lead: COA Grassroots Manager; Support: COA Education and Events Manager, COA Development Manager, COA Membership Coordinator, COA Communications and Social Media Manager

Resources: AOA, COA societies, California schools and colleges of optometry, COA public relations firm

Due: 2016.

Status:

11/14: COA hosted in October 2014 a vision health fair in Salinas.

2/15: COA partnered with the Black Legislative Caucus to produce a television public service announcement and a documentary on four California African-American athletes.

2/16: COA assisted COA Santa Clara County Optometric Society with its upcoming April 2016 participation at local community health fair.

4/16: Dr. Jason Tu was interviewed live by KUSI News in San Diego about SB 622, COA's legislation to expand the scope of practice of optometrists. [Click here to view the clip.](#)

Action Item 4: Create talks/slides on vision and eye health-related topics for use by doctors of optometry in public speaking.

Objective Detail:

1. Local doctors of optometry to talk to Rotary groups, schools, etc., on children's vision development, AMD, etc.

2. Request doctors of optometry to share their existing talks.

COA Staff Lead/Support: Lead: COA Communications and Social Media Manager, COA External Affairs Manager; Support: COA Membership Coordinator

Resources: COA Communications Committee, COA Health Care Delivery Systems Committee, member doctors of optometry

Due: 2016.

Status:

2/16: • COA developed two animated videos, made available to members to use in speaking engagements with community groups to educate them on the shortcomings of online refractions and what constitutes a comprehensive eye examination by an eye care professional - 1-minute version: <https://www.youtube.com/watch?v=SEtScLmo5a4>; 2-minute version: https://www.youtube.com/watch?v=ld1U_CalGLM.

• The COA Communications Committee has authored bi-monthly blogs, posted to the COA website, that can be used in speaking engagements to educate the public on various vision and eye health-related matters.

4/16: At the request of the COA Board of Trustees, a COA-developed PowerPoint presentation on the history of the optometric branch office law was provided to each trustee.

6/16: A CE course on properly diagnosing and removing lumps and bumps filmed at COA's House of Delegates was provided to members.

Strategy 6: Educate the public on children's vision and the positive impact of comprehensive eye health and vision exam conducted by a doctor of optometry.
(See: Strategies 2, 3, and 5 under this goal; and, Goal 2, Strategy 5, Action Item 1 and Strategy 6.)

Indicator of Success: Prevalence or incidence of the number of children receiving eye health and vision exams.

11/15: SP Recommendation: **1)** Revise the strategy to make clear the that which COA wishes to educate the public relative to exams conducted by doctors of optometry. **2)** Revise the indicator of success to be better reflect the standards of measuring results of the action items below.

Action Item 1: Explore which groups to target and venues to educate the group on children's vision and the role of doctors of optometry.

Objective Detail: California School Nurses Organization (CSNO), the state Parent Teachers Association (PTA), state Department of Education, California Teachers' Association (CTA), Association of California School Administrators (ACSA), California School Boards Association (CSBA).

COA Staff Lead/Support: Lead: COA External Affairs Manager; Support: COA Communications and Social Media Manager

Resources: COA public relations firm, COA BOT, COA HOD; unknown financial costs to present before identified groups

Due: 2017.

Status:

2/15: • COA met with representatives from the Healthier Kids Foundation Santa Clara County and Welch Allyn about how children's' vision is being screened in that county.
• COA spoke with members from the California School Nurses Organization and participated in its webinar about school vision screenings.
• COA has been in contact with individual school nurses and provided guidance for implementing the new requirements for children's vision screenings.
6/15: • COA is supporting SB 402, Mitchell, which would mandate comprehensive eye exams of children up entering school and every two years thereafter. In addition to the State Board of

Optometry, the legislation's sponsor, COA has recruited the Pan Ethnic Health Network to support the bill. COA continues to reach out to the California Primary Care Association, First 5, Parent Teachers Association and the California Teachers' Association to gain support. The measure is pending in the Senate Appropriations Committee.

11/15: • SB 402 did not pass the 2015 Legislative Session and COA is working with the author, Senator Mitchell, in her consideration of its reintroduction in 2016.

• COA will work with its public relations firm, Burson-Marsteller, to incorporate into the 2016 COA public relations plan a focus on public education on the limits of screening.

2/16 • COA is working with its public relations firm, Burson-Marsteller, to focus part of COA's 2016 public relations plan public education on the importance of comprehensive eye exams.

• Senator Mitchell decided to not pursue SB 402 in 2016. COA is working with the State Board of Optometry on an interested parties meeting scheduled for February 18 about school screenings and the need for comprehensive eye exams.

4/16: COA has been participating at stakeholder meetings organized by the SBO to generate input, support and coalition building in anticipation of a 2017 SBO-sponsored measure requiring comprehensive eye examinations for children entering school.

Action Item 2: Create talks/slides on children's vision for use by doctors of optometry in presenting before identified groups.

Objective Detail: Request doctors of optometry to share their existing talks.

COA Staff Lead/Support: Lead: COA Communications and Social Media Manager; Support: COA External Affairs Manager

Resources: COA Communications Committee, COA Health Care Delivery Systems Committee, member doctors of optometry

Due: 2017.

Goal 5: Improve communications with our members.

Strategy 1: Increase face-to-face member outreach and meeting participation.

Indicators of Success:

1. Increase COA town hall meeting attendance and engagement.
2. Increase society communication (possibly revisit board/society visits).

Action Item 1: Increase COA town hall meeting attendance and engagement.
(See Goal 1, Strategy 4, Action Item 2.)

Objective Detail:

1. Measure attendance at meetings.
2. Utilize polling to encourage attendee participation
3. Post meeting feedback on, society and COA web and social media sites.
4. Explore options for more effective promotion for town hall meetings.

COA Staff Lead/Support: Lead: COA Grassroots Manager; Support: COA Development Manager, COA Communications and Social Media Manager, COA Governmental Affairs Director

Resources: COA societies; COA Membership Committee, COA Board of Trustees (BOT), COA House of Delegates (HOD); \$14,000 estimated financial costs for staff attendance at town hall meetings, unknown: costs for polling and additional technology.

Due: Meetings beginning in 2015

Status:

11/14: COA presented town hall meetings at several societies in the fall of 2014 and more are scheduled for the winter of 2014.

11/15: Town hall meetings are tentatively scheduled for the fall of 2015 and early 2016 at the following COA societies: San Fernando Valley, Santa Clara County, Los Angeles County, San Gabriel Valley, Tri-Counties and Alameda Contra Costa County.

2/16: COA conducted 10 town hall meetings in the winter of 2016 that focused on relevant membership benefits and services, updates on legislative and third-party issues, grassroots lobbying on the local level for optometric scope expansion and upcoming primary elections.

4/16: COA continues to present town hall meetings at societies, with one scheduled for April at the COA Orange County Society and one requested by the COA San Joaquin Optometric Society for May.

Action Item 2: Develop reward and recognition program for COA participation.
(See Goal 1, Strategy 5, Action Item 1; and, Goal 3, Strategy 2, Action Item 1.)

Objective Detail: Consider rewards as a benefit.

COA Staff Lead/Support: Lead: COA Development Manager; Support: COA Communications and Social Media Manager; Support: COA Education and Events Manager, COA Membership Coordinator

Resources: COA Membership Committee, COA Awards Committees, COA BOT, COA HOD; unknown financial costs for recognition awards.

Due: January 2017.

Status:

2/15: COA reached out to members who had been AOA/state affiliate members for 45 years or more to congratulate them and offer life membership status.

11/15: SP Recommendation: Revise the due date to January 2017.

Strategy 2: Enhance digital member outreach and participation.

(See Goal 1, Strategy 1; Goal 4, Strategy 5.)

Indicator of Success: Increase all digital analytics by 50% over three years.

Action Item 1: Tailor e-mail communication to drive open/click rates and further electronic engagement.

Objective Detail: Evaluate analytics to better target messages through all electronic mediums, e.g., e-blasts, A/B testing, social media.

COA Staff Lead/Support: Lead: COA Communications and Social Media Manager; Support: COA Development Manager

Resources: COA Communications Committee, COA Membership Committee

Due: June 2017

Status:

11/14: Marketing e-mails for the 2014 COA Monterey Symposium tailored to specific segments of members have been developed and employed.

2/15: • The inaugural edition of the digital *California Optometry* magazine was released and staff is compiling open rates, along with soliciting reader feedback electronically, to better tailor its contents to members' desires.

• E-mails have been tailored to target demographics such as students, women ODs, PAC contributors, optometric staff, young ODs and more. The effort to tailor these emails better allows us to message for the appropriate audience, which has created a more personal engagement. This strategy, combined with new and better e-mail communication, has improved our open rates an average of an impressive 12 percent.

6/15: With the newly structured OptoWest featuring two locations, promotional emails were sent to area-specific recipients (counties in relation to San Jose and Anaheim). The results were similar to previous OptoWest open rates (avg. 26% open rate), but this targeting allowed us to only promote events in the areas of those likely to attend. This avoids mass amounts recipients opting out of our email list.

11/15: • Tailored email outreach for OptoWest North (San Jose) was very successful as measured by event registration, but OptoWest South (Anaheim) did not fare as well suggesting the need for more sophisticated targeted messaging. We've learned that communication must be tailored differently for OptoWest South, as the CE opportunities are more abundant in that area.

- Targeted email marketing of Monterey Symposium 2015 has been very successful as measured by registration, using demographics such as, paras, ODs under 30 years old and ODs over 30 years old.
- SP Recommendation: COA has been surveying members (and soon non-members) to capture demographic and other information. Additionally, COA is in the process of selecting a new database that will be able to store the demographic information collected and updated. This information will assist COA in more sophisticated targeting of its messages and events. It is anticipated that this new software will be implemented by the third quarter of 2016, and the first event after that to be held in February 2017. Thus, it is recommended that the due date be revised to June 2017.

Action Item 2: Social media: analyze data of current and ongoing engagement.
(See Goal 1, Strategy 1; and, Goal 4, Strategy 1, Action Item 1.)

Objective Detail:

1. Facebook, Twitter, blog.
2. Create an online community for clinical feedbacks, practice management, tracking analytics.

COA Staff Lead/Support: Lead: COA Communications and Social Media Manager; Support: COA Development Manager

Resources: COA Communications and Membership Committees; unknown potential costs for creating online clinical feedback community

Due: June 2017.

Status:

11/14: Social media data is limited, but the data available is being recorded to report a high level of public (non-OD) engagement. Resources for other online communities are being explored.

2/15: Demographics data mined thus far, such as students, women ODs, PAC contributors, optometric staff, young ODs and more, are being used to target appropriate e-communications resulting thus far with an impressive 12 percent open rate improvement.

6/15: The COA Communications Committee is experimenting with various times and days for delivery of all digital communications to further increase viewership.

11/15: SP Recommendation: Revise the due date to June 2017.

Action Item 3: Redesign COA website.
(See Goal 4, Strategies 1, 2 and 5.)

Objective Detail: Enhance user experience and expand relevant optometric resources.

COA Staff Lead/Support: Lead: COA Network Administrator, COA Communications and Social Media Manager; Support: COA Executive Director, COA Development Manager, COA Education and Events Manager, COA Governmental Affairs Director

Resources: COA Membership Committee; unknown, but likely substantial financial costs

Due: 2017

Status:

11/14 COA conducting a search for a new website solution with user experience and ease of resource access key features in evaluating platforms.

11/15: SP Recommendation: COA is in the process of selecting a website portal that will feature a new look and better navigation tools. It is anticipated that this new software will be implemented by the third quarter of 2016. Thus, it is recommended that the due date be revised to that quarter.

6/16: COA has selected a new database portal and will begin the migration of the data base in 2016. The new database will enable enhance of user website experience by, among other things, allowing for online event registrations, membership joining and member record updating.

Action Item 4: Consider development of COA app.

Objective Detail: Consider app in website redesign or determine additional non-website functions that the app will deliver.

COA Staff Lead/Support: Lead: COA Network Administrator, COA Communications and Social Media Manager

Resources: COA Membership Committee, COA Communications Committee, COA BOT, COA HOD; unknown, potentially substantial costs to develop and host an app

Due: November 2017.

Status:

2/15: The 2015 COA Presidents' Council requested that the COA Board of Trustees explore the development of an app. COA is conducting a search for a new website solution that is mobile-friendly (fully responsive) and more interactive. It is conceivable that the new, mobile-friendly website will be just as effective as a separate app. In redesigning the website, COA will concurrently explore the development of an app and what, if any, unique user features beyond a mobile-friendly website it could offer.