



PSP 2024-2027 Strategic Plan
Date Approved by Board of Directors: 4/12/24
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A. Introduction:

Almost four years ago our Board created a strategic plan for PSP in response to a financial crisis and the offer of a generous anonymous donor to provide 'bridge' funding for our 'turn around' efforts. These plans focused largely on re-grounding our organization in our core educational, clinical, and social mission while also putting it on sounder financial footing.

We were excited and optimistic about our prospects when only months in, the COVID PANDEMIC began and brought with it a whole new set of adaptive challenges.

Our adaptive responses to these challenges include:

- Expansion of our On-line Psychoanalytic Education capabilities-leading to greater access and diversity. We were able to do this more agilely because of the loyalty and efforts of our staff, faculty, and student body. The impacts of this have been transformational.
- Expansion of our programmatic reach by instituting a new curriculum and certificate program in Organizational Dynamics, Leadership and Consulting (ODLC).
- Similarly, our focus on Telehealth for continuing to serve our low income and Medicaid clients. Not many providers were as willing to do this and thus we were rewarded financially by Community Behavioral Health (CBH), our chief group practice funder.
- Our response to the killings of George Floyd and others during the summer of 2020 focusing on systemic racism within all institutions including our own alongside greater recognition of intersecting inequalities in addressing gender and other minoritized differences. This recently included the formation of a student/candidate led Committee on Diversity, Equity and Inclusion which advises our board of directors and Psychoanalytic Studies Committee on these issues.
- Our early and on-going participation in the work of The Holmes Commission focusing on systematic DEI issues within psychoanalysis.

- All these developments have corresponded and been facilitated by the strengthening of our Board of Directors and the efforts of an over-stretched but devoted and capable faculty and staff.
- Finally, we are clearer than ever that collaborative leadership development across all segments of our organization is essential. This includes helping our gifted candidates/students prepare for a variety of leadership roles (society, faculty, board and committees)

As a result of these activities our institute is missionally, fiscally, and structurally stronger than we have known it to be in decades.

Yet there is so much more that can and should be done.

Our new Strategic Plan will bring a fresh and sharper vision to help us set the right priorities and inspire us to meet the adaptive challenges we know to be critical as well as the ones we do not know except that they will come.

B. PSP’s Mission and Values:

Mission Statement:

The mission of the Philadelphia School of Psychoanalysis is to develop and sustain a strong psychoanalytic community, which has many functions: education, training, research, the practice of psychoanalysis, as well as service to its membership. The sense of community rests on a foundation of shared values: commitment to lifelong personal growth, professional ethics, mutual support among analysts, and fruitful involvement with the psychoanalytic and the larger community. These values are shaped by a historical vision of psychoanalysis that includes a theory of mind, a way of understanding social phenomena, and a treatment process.

Diversity Statement:

The Philadelphia School of Psychoanalysis strives to foster a climate of purposeful inclusion of all people. We value the diversity of racial and cultural identity and background, nationality, sexual and affectional orientation, gender identity and its expression, religious background and belief, marital status, family structure, age, mental and physical health and ability, political perspective, and educational and class status.

C. PSP’s Five Strategic Goals for 2024-2027- The PSP Board of Directors identified five strategic goals for the organization for the next three years. They are as follows:

1. **Diversification and Strengthening of Faculty and Leadership:** Address the weaknesses related to the lack of diversity and clarity in faculty roles and responsibilities. This includes recruiting more diverse faculty members, establishing clear requirements for faculty and student progression, and

implementing ongoing evaluative procedures. Developing succession plans for leadership positions is also crucial to ensure sustainability.

2. **Enhancing Branding and Marketing Efforts:** Develop a strategic marketing plan to increase visibility and attract more students and clients. This includes improving branding efforts to differentiate the organization from competitors, particularly in the context of online education and coaching programs.
3. **Expanding Program Offerings and Opportunities:** Explore opportunities to expand program offerings and initiatives, such as increasing course diversity, developing additional training tracks, and fostering collaborations with external partners. This includes capitalizing on the growing acceptance of online education and leveraging unique program aspects, such as the Modern Analytic orientation and the ODLC Program, to attract students and clients.
4. **Improving Stakeholder Engagement and Satisfaction:** Enhance engagement with members, stakeholders, and the community by addressing weaknesses in communication and participation. This involves developing clearer purposes and strategies for engaging stakeholders, providing incentives for participation, and collecting feedback to assess satisfaction levels and identify areas for improvement.
5. **Ensuring Financial Sustainability and Resource Management:** Develop plans to ensure long-term financial sustainability and effective resource management. This includes diversifying funding sources beyond dependence on specific programs or partnerships, optimizing resource allocation to support program growth and development, and establishing mechanisms for evaluating and maximizing the return on investment for various initiatives.

Board Initiatives

1. Establish Diversity Goals

Objective: Increase the diversity of the Board over the next three years.

Action Steps:

- a. Conduct a diversity audit of the current Board to assess areas for improvement.
- b. Set specific targets for increasing diversity, such as the percentage of board members from underrepresented groups.
- c. Implement outreach efforts to networks and communities of color to attract potential board candidates.
- d. Regularly review progress toward diversity goals and adjust strategies as needed.
- e. Revise mission and vision statements to encompass improvements and expansion.

2. Invite Persons From Underrepresented Communities Onto the Board

Objective: Invite two persons from underrepresented communities onto the Board who bring skills that enhance Board development.

Action Steps:

- a. Create criteria for Board membership that aligns with our Mission and Values
- b. Identify potential candidates from diverse backgrounds who possess skills that complement the existing Board.
- c. Reach out to individuals through personal connections, professional networks, and community organizations.
- d. Provide information about the organization, its mission, and the role of board members to interested candidates.
- e. Facilitate meetings or interviews with candidates to assess their qualifications and alignment with the organization's values.
- f. Extend formal invitations to selected candidates to join the Board and provide support for their onboarding process.

3. **Expand Recruitment Channels**

Objective: Identify specific paths to leadership within the organization

Action Steps:

- a. Assess current recruitment channels and identify gaps or limitations in reaching diverse candidates.
- b. Explore partnerships with community organizations, educational institutions, and professional associations to expand recruitment networks.
- c. Develop targeted outreach strategies to engage potential leaders from underrepresented groups, such as mentorship programs or leadership development initiatives.
- d. Provide training and support for internal staff and volunteers to identify and nurture emerging leaders within the organization.
- e. Evaluate the effectiveness of recruitment channels regularly and adjust strategies based on feedback and outcomes.

4. **Promote Succession Planning and Leadership Development**

Objective: Identify other organizations for target networking and collaboration that might lead to adding Board members.

Action Steps:

- a. Research and identify organizations with complementary missions or values that could provide potential board members.
- b. Initiate networking opportunities with leaders and representatives from identified organizations to explore collaboration possibilities.
- c. Attend industry events, conferences, and forums to connect with potential candidates and build relationships.
- d. Facilitate cross-promotion and mutual support between organizations through joint initiatives or shared resources.
- e. Monitor and evaluate the outcomes of networking and collaboration efforts, seeking feedback from participants and assessing the impact on board recruitment and diversity goals.

Executive/Staff Initiatives

1. Increase diversity within faculty and leadership roles and establish clear succession plans for sustained organizational growth.

Objective: Work with the Board and the Psychoanalytic Studies Committee to recruit more diverse faculty and Board members.

Action Steps:

- a. Identify target demographics for diversity recruitment.
- b. Develop outreach strategies to underrepresented communities.
- c. Establish partnerships with diversity-focused organizations.

Objective: Work with the Psychoanalytic Studies Committee to Implement faculty evaluation procedures

Action Steps:

- a. Develop evaluation criteria to assess faculty knowledge of diversity, equity and inclusion in curriculum and classroom instruction
- b. Conduct annual assessments of faculty
- c. Provide one diversity-related in-service for faculty annually
- d. Identify deficits in faculty teaching skills and develop and provide continuing education.

Objective: Work with Succession Planning Committee to develop succession plans for key leadership positions.

Action Steps:

- a. Identify critical leadership roles for succession planning.
- b. Assess current leadership capabilities and potential successors.
- c. Create development plans for identified successors.
- d. Implement mentorship and training programs to prepare future leaders.

2. Increase visibility, attract students and clients, and differentiate PSP from other psychoanalytic institutes through effective marketing strategies.

Objective: Conduct Market Research; Identify target demographics and assess competitive positioning.

Action Steps:

- a. Create a Marketing task force composed of both internal stakeholders and external marketing specialist(s)
- b. Hire a marketing consultant to conduct market research and develop a comprehensive marketing plan
- c. Conduct surveys and/or interviews with current and potential stakeholders.
- d. Analyze market trends and competitor strategies.
- e. Identify key differentiators

Objective: Develop a comprehensive marketing strategy.

Action Steps:

- a. Define marketing goals and objectives.
- b. Determine budget allocation and resource needs.

- c. Develop messaging and branding guidelines.
- d. Create a marketing plan outlining tactics, timelines, and responsibilities.

Objective: Enhance Branding Efforts: Develop consistent messaging and visual identity.

Action Steps:

- a. Hire a website developer
- b. Update logos, colors, and visual elements to reflect organizational values.
- c. Create brand guidelines for internal and external use.
- d. Ensure consistency across all marketing materials and channels.

Objective: Implement targeted marketing campaigns.

Action Steps:

- a. Identify key marketing channels (e.g., website, social media, email).
- b. Develop content and creative assets for each channel.
- c. Launch and monitor campaigns, adjusting strategies based on performance data.

3. Expand program offerings, foster collaborations, and leverage organizational strengths

Objective: Assess market demand and organizational strengths.

Action Steps:

- a. Conduct market research to identify emerging trends and opportunities in the field of psychoanalysis
- b. Evaluate existing programs and resources to determine areas for expansion.
- c. Seek input from stakeholders, including faculty, students, and affiliated members

Objective: Expand program offerings

Action Steps:

- a. Develop criteria for evaluating potential program expansions
- b. Assess potential impact, resources required, and alignment with PSP's goals
- c. Prioritize initiatives based on strategic fit and available resources
- d. Revise Student Handbook
- e. Explore value of a Residency Program.

Objective: Foster strategic collaborations

Action Steps:

- a. Research potential partners, including academic institutions, mental health associations, and community organizations
- b. Evaluate compatibility of missions, goals, and resources
- c. Initiate discussions and exploratory meetings with potential collaborators
- d. Develop frameworks for successful collaboration

Psychoanalytic Studies Committee Initiatives

1. Add Faculty

Objective: Recruit two additional faculty members within the next three years

Action Steps:

- a. Prioritize DEI in the recruitment of faculty; review Holmes Commission recommendations and develop criteria for recruitment of faculty;

- b. Invite potential faculty members to meetings, as presenters, etc., to gauge whether they are a good fit for our community and educational programs
- c. Explore competing faculty reimbursement

2. Enhance Faculty and Teaching Assistant Support

Objective: Initiate a faculty development plan

Action Steps:

- a. Implement ongoing evaluative procedures for faculty;
- b. Offer two faculty in-service programs annually
- c. Develop a faculty handbook
- d. Implement Teaching Assistant supports and interaction with the PSC

3. Enhance Curriculum

Objective: Develop three new courses in the next three years

Action Steps:

- a. Prioritize DEI in the preparation of our curriculum;
- b. Survey students and society members and other institutes for potential new courses in curriculum
- c. develop courses in research, child analysis

Philadelphia Consultation Center Initiatives

1. Increase diversity within the provider and leadership team to better reflect the community served and enhance cultural competence

Objective: Establish diversity recruitment and retention strategy

Action Steps:

- a. Develop targeted recruitment strategies to attract diverse therapists and leadership candidates
- b. Implement periodic diversity training and workshops for existing therapists and staff to promote inclusivity and cultural competence
- c. Establish mentorship program to support the professional growth and advancement of diverse talent within the group practice

2. Branding and Marketing Strategy Implementation:

Objective: Work with the Executive Director and Marketing Team to develop and implement a strategic marketing plan to enhance the group practice's visibility and attract more clients.

Action Steps:

- a. Work with Marketing Team on market research to identify target demographics and assess competitive positioning.
- b. Work with Marketing Team on developing a comprehensive marketing strategy outlining key objectives, target audience, and messaging

3. Expansion of Program Offerings and Collaborations:

Objective: Explore opportunities to expand PCC's program offerings to meet the evolving needs of the community, attract a broader range of clients, and strengthen the connection between PCC and PSP's educational programs

Action Steps:

- a. Conduct needs assessments and surveys to identify areas of demand for mental health services within the community.
- b. Develop new program offerings, such as specialized therapy groups, workshops, or educational seminars, based on identified needs and interests
- c. Forge strategic partnerships with external organizations, such as local schools, community centers, or healthcare providers, to expand reach and access to mental health services.

Objective: Leverage PSP's online education offerings and unique program aspects to attract new clients and engage PCC providers in psychoanalytic education

Action Steps:

- a. Develop online therapy programs or teletherapy services to reach clients beyond PCC's geographical location.
- b. Offer free psychoanalytic courses and workshops to PCC providers
- c. Encourage and offer incentives to PSP students to work at PCC

Finance/Institutional Advancement Initiatives

1. Strengthening Financial Resources

Objectives: Evaluate a Portfolio Management Program

Action Steps:

- a. Determine liquidity needs and identify funds for variable risk investments
- b. Maintain pro forma financial statements for three years running
- c. Insure uses of funds are covered by sources of funds for all programs

2. Improving Fundraising Expertise

Objectives: Recruit a fundraising expert to enhance revenue generation and sustainability efforts

Action Steps:

- a. Identify specific areas where expertise in fundraising could lead to improved outcomes, such as donor cultivation, grant writing, or event planning.
- b. Define the scope of responsibilities and expectations for the role, including fundraising goals, reporting structures, and performance metrics.
- c. Determine recruitment channels and outreach methods to attract qualified candidates, such as posting job listings on relevant websites, reaching out to professional networks, and leveraging social media platforms.

3. Developing Programs & Services to enhance fundraising efforts

Objectives: Identify programs and/or services that would enhance fundraising efforts and diversify revenue streams

Action Steps:

- a. Evaluate existing programs and services, as well as program ideas generated from the Visioning Exercise, to identify those with high potential for fundraising support.

- b. Assess the alignment of programs/services with the organization's mission, values, and strategic goals.
- c. Analyze past fundraising efforts associated with each program/service to identify successes, challenges, and opportunities for improvement.
- d. Conduct market research to assess the demand for potential new programs/services among target audiences and stakeholders.
- e. Analyze market trends, competitor offerings, and funding opportunities to inform decision-making.
- f. Conduct feasibility studies to evaluate the financial viability, operational requirements, and potential impact of proposed programs/services.

Diversity, Equity & Inclusion Advisory Committee Initiatives

1. Enhance Faculty Resources

Objective: Provide the Psychoanalytic Studies Committee recommendations related to Diversity, Equity & Inclusion

Action Steps:

- a. Develop recommendations for faculty qualifications with a focus on background in diversity
- b. Review all syllabi for all core courses and make recommendations for course content
- c. contribute recommendations to the Board and PSC on how to expand recruitment channels and invite more diverse leadership
- d. make recommendations to the PSC regarding potential diversity trainings that may be beneficial to faculty

2. Enhance Board Resources

Objectives: Provide the PSP Board recommendations related to Diversity, Equity & Inclusion

Action Steps:

- a. Provide data analysis of membership survey conducted in the Fall of 2023
- b. Make recommendations based on the findings of that analysis and
- c. Provide an Executive Summary for the Board

ODLC Program Initiatives

1. Program Design Optimization

Objectives: Program *Design* is optimized and articulates coherence among program elements (courses, pathways to graduation and timelines, supervision requirement, capstone project, internship, program learning objectives)

Action Steps:

- a. Build model pathways to program completion

- b. Identify program expansion/enhancement needs and interests (i.e. coaching, supervision, capstone options)
- c. Develop new course offerings in the needed areas
- d. Recruit additional instructors to design and teach new and existing courses
- e. Create a faculty development plan for ODLC instructors, based on criteria for best practices and emerging faculty learning e.g. new developments in PsyA theory/technique and distance teaching/learning technologies.

2. DEI Integration

Objectives: **DEI is integrated in the program as a whole**

Action Steps:

- a. Identify and articulate core program DEI values
- b. Specify desired DEI principles and best practices
- c. Review all curriculum offerings to ensure integration of DEI principles and practices through-out
- d. Develop achievable faculty inclusion and recruitment plans and benchmarks

3. Program Administration

Objectives: **The program has matured its communications and administrative capacity to attract and support program participants from first contact to program completion**

Action Steps:

- a. Work with PSP marketing staff or consultants to design an ODLC brand strategy that conveys the program's unique value proposition
- b. Develop a marketing plan to communicate the brand message and attract a diverse pool of participants
- c. Enhance and/or build administrative data systems and personnel capacity to improve:
 - marketing function (grow our contact list, respond to inquiries)
 - enrollment function (track admissions and registration processes)
 - student support function (document student accomplishments, monitor progress to completion/graduation, provide student transcripts)

Monitoring and Evaluation:

Establish key performance indicators (KPIs) to measure progress toward goals.

Develop a monitoring and evaluation framework to track KPIs regularly.

Schedule periodic reviews to assess progress, identify challenges, and make adjustments as needed.

Conclusion:

The PSP Strategic Plan for 2024-2027 outlines a comprehensive roadmap for the organization's continued growth and success, emphasizing the importance of collective effort and

commitment to achieving its mission and vision. Despite facing challenges such as the COVID-19 pandemic and systemic issues like racial injustice, PSP has adapted and thrived through innovative responses and collaboration.

The plan is anchored in PSP's mission to develop and sustain a strong psychoanalytic community, guided by shared values of lifelong personal growth, professional ethics, and community engagement. A commitment to diversity and inclusion is woven throughout the plan, reflecting PSP's dedication to fostering a climate of purposeful inclusion for all individuals.

Five strategic goals have been identified to drive PSP's efforts over the next three years:

1. Diversification and Strengthening of Faculty and Leadership
2. Enhancing Branding and Marketing Efforts
3. Expanding Program Offerings and Opportunities
4. Improving Stakeholder Engagement and Satisfaction
5. Ensuring Financial Sustainability and Resource Management

Each goal is accompanied by specific initiatives aimed at addressing key challenges and opportunities. For example, initiatives under the Diversification and Strengthening of Faculty and Leadership goal include establishing diversity goals, inviting persons of color onto the board, expanding recruitment channels, and promoting succession planning and leadership development.

The plan also highlights the importance of collaboration across different segments of the organization, recognizing that collective leadership development is essential for sustained success. Initiatives involving the Board, Executive/Staff, the Psychoanalytic Studies Committee, the Diversity, Equity & Inclusion Advisory Committee, the Philadelphia Consultation Center, the Finance/Institutional Advancement, and the Organizational Dynamics, Leadership, and Consulting program demonstrate the commitment to shared goals and values.

Furthermore, the plan outlines specific action steps for each initiative, emphasizing the importance of thorough planning, implementation, and evaluation. These action steps include conducting market research, developing recruitment strategies, enhancing program offerings, fostering collaborations, and strengthening administrative capacity.

In conclusion, the PSP Strategic Plan for 2024-2027 underscores the organization's resilience, adaptability, and commitment to excellence. It acknowledges the challenges ahead while embracing opportunities for growth and innovation. PSP expresses gratitude to all stakeholders involved in the planning process, recognizing their invaluable contributions to shaping the future of the organization.

Key Documents:

- PSP By-Laws-Revised 2023
- Previous Strategic Plans
- Holmes Commission Report
- PSP Board Performance Review 2023

- Budgets: Current and Forecast
- Visioning Exercise Data
- SWOT Analysis Data