



# CBMTG Strategic Plan 2014 to 2017

# Contents

INTRODUCTION.....	3
CONTEXT FOR STRATEGIC PLANNING .....	3
STRATEGIC PLANNING PROCESS .....	4
ENVIRONMENTAL SCAN SUMMARY .....	4
SOAR ANALYSIS .....	4
INTERVIEWS.....	5
SURVEY.....	5
ENVIRONMENTAL SCAN OVERVIEW.....	5
STRATEGIC PLANNING RESULTS .....	6
VALUES & PHILOSOPHY.....	6
MISSION .....	6
VISION .....	6
STRATEGIC PRIORITIES .....	6
ORGANIZATION STRUCTURE.....	7
STRATEGY MAP .....	8
APPENDIX 1: STRATEGIC ACTION PLAN.....	9
APPENDIX 2: SUMMARY OF INTERVIEWS .....	10
APPENDIX 3: SUMMARY OF SURVEY .....	11

## Introduction

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First Leadership was engaged in August 2013 to assist the executive of the Canadian Blood and Marrow Transplant Group to complete its strategic plan. First Leadership consultants worked in collaboration with the association executive director and executive committee to design the approach and collect information for an environmental scan. Interviews and surveys were conducted to inform the strategic plan. These interviews and surveys were confidential and no individuals are identified in the findings.

Strategic planning sessions were held October 26 and 27, 2013 and January 11 and 12, 2014. At the strategic planning session held October 26 and 27, 2014 an environmental scan was presented based on interviews of board members, the executive director and stakeholders, as well as a survey that had elicited responses from 25% of the membership. The executive worked with the consultant using the SOAR strategic planning framework to generate thinking that would clarify values, mission, vision, strategic priorities and the organization's structure. The conversations of board members and the executive director in the planning process produced the content of the strategic plan. The consultant used notes from the session to develop this first draft strategic plan in order to assist the board in their next steps.

The executive committee agreed that further discussion was necessary and a second strategic planning session was organized for January 11 and 12, 2014. The CBMTG executive director and secretary worked alongside First Leadership consultants to design the agenda of the January 11 and 12 strategic planning sessions. The end result of these meetings was: a strategic plan, a strategic action plan, a governance manual, and a policy manual. These documents will be presented to the membership in advance of the 2014 annual general meeting.

A strategic plan is an important document for the board of directors, staff, committee members and the membership of an organization. An effective strategic planning process will examine and make informed projections about environmental realities to anticipate and make change by clarifying its vision, values, mission and goals. The plan is a clear statement of the board's intent as well as expectations for staff, volunteer committees and partners. It provides a message about the short and long term aims for the membership and others in their environment, including the public. The process of planning is a time to think, consider possibilities, reframe obstacles and seek consensus on directions and actions.

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## Context For Strategic Planning

The previous CBMTG Strategic Plan (February 2011), articulated a vision, a mission and four strategic directions. The four strategic directions from the past strategic plan are outlined below:

- I. *Foster and increase multi-disciplinary involvement*
- II. *Increase networking and communications*

- III. *Expand infrastructure*
- IV. *External relations and advocacy*

Overall the strategic plan guided CBMTG for the past two to three years and much has been accomplished. The current draft builds upon this plan and makes several significant adjustments to vision, mission, values and strategic directions.

## Board Strategic Planning Process

A brief overview of material previously presented to the board to stimulate conversation about strategic issues is provided below.

### ENVIRONMENTAL SCAN SUMMARY

An environmental scan is a process of collecting, analyzing and distributing information for tactical and strategic purposes. The purpose of an environmental scan is to provide planners with strategic intelligence by evaluating potential significant environmental trends and changes. It gathers factual and subjective information from relevant sources to enable adaptive planning before trends are fully developed. Information gathered may be in terms of issues, expectations, events, organization abilities, infrastructure, human resources, structure, systems and impact. At best, a scan is a snapshot for consideration.

To obtain information for the scan, interviews of board members, two senior members of CBMTG and the executive director were undertaken. Board minutes and the previous strategic plan were reviewed and a survey of membership was conducted.

### SOAR ANALYSIS

**SOAR** (Strengths, Opportunities, Aspirations and Results) is based on appreciative inquiry which involves the discovery of what gives life to a system when it is most effective and constructively capable in economic, ecological and human terms. It is also a proven approach for generating new energy and ideas for organizations. When conducting a **SOAR** analysis, the basic questions to be answered are:

- I. *What are our greatest strengths?*
- II. *What are our best opportunities (and main challenges) going forward?*
- III. *What is the preferred future that we aspire to?*
- IV. *What are the measurable results that will tell us we are moving toward the vision of the future?*

The SOAR analysis framework depicted below combined findings from the interviews and the membership survey. Overall, it is fair to say that the vast majority (i.e., board executive and mem-

bership) see the same strengths, opportunities/challenges, aspirations and results to measure. Going forward, there is support for research, the bone marrow registry, education, webinars, SOSI-DO, the CBMTG conference, growth of membership, building partnerships, enhancing financial status and obtaining greater visibility for CBMTG. Many want the direction of the organization clarified as well as the benefits of membership. There are some questions about holding an annual conference and how to attract more physicians into the field.

#### 📌 INTERVIEWS

In total, six executive committee members, the executive director and two additional individuals who

have had long relationships with CBMTG were interviewed. The interview guide had seven basic **SOAR** questions that most often elicited expansive, thoughtful answers. See appendix two for more detailed analysis of the interviews.

#### 📌 SURVEY

There were 44 responses to the survey representing about 25% of the CBMTG membership. This is an acceptable though not stellar response rate that does provide useful information to augment the interview findings. Survey Monkey technology was used and respondents seem to find that relatively easy to use. See appendix three for more detailed analysis of the survey.

#### 📌 ENVIRONMENTAL SCAN OVERVIEW

STRENGTHS	OPPORTUNITIES & CHALLENGES
<ul style="list-style-type: none"> <li>• SIZABLE INTERPROFESSIONAL MEMBERSHIP</li> <li>• CLINICAL TRIALS</li> <li>• BONE MARROW REGISTRY</li> <li>• CONFERENCE</li> <li>• PEOPLE, ORGANIZATION &amp; WORK</li> <li>• FINANCIAL STATUS</li> <li>• EDUCATION &amp; COMMUNICATION</li> </ul>	<ul style="list-style-type: none"> <li>• GROWING MEMBERSHIP</li> <li>• FUNDING</li> <li>• BONE MARROW REGISTRY</li> <li>• PARTNERSHIPS</li> <li>• CONFERENCE APPEAL</li> <li>• EDUCATIONAL RESOURCES</li> <li>• NATIONAL AND INTERNATIONAL VISIBILITY</li> </ul>
ASPIRATIONS	RESULTS TO MEASURE
<ul style="list-style-type: none"> <li>• CLARIFY DIRECTION</li> <li>• GROW MEMBERSHIP</li> <li>• FINANCIAL STABILITY</li> <li>• PARTNERSHIPS</li> <li>• ENHANCE COMMUNICATION</li> <li>• STIMULATE RESEARCH</li> <li>• ROYAL COLLEGE DESIGNATION</li> </ul>	<ul style="list-style-type: none"> <li>• STRATEGIC PLAN IMPLEMENTATION</li> <li>• FINANCIALS</li> <li>• MEMBERSHIP</li> <li>• COMMUNICATION &amp; EDUCATION</li> <li>• CONFERENCE ATTENDANCE</li> <li>• CLINICAL TRIALS</li> <li>• HUMAN RESOURCES (“manpower”)</li> </ul>

# BOARD STRATEGIC PLANNING RESULTS

## VALUES & PHILOSOPHY

An introductory question posed to the board involved the values they shared. Values are important because they help to clarify the vision and the business of the organization. The initial list of values generated from the interviews and survey was discussed. Basically, the executive agreed with the list but the executive agreed to the following values:

*Excellence, innovation, integrity, collaboration and professionalism in care, education and research in blood and marrow transplant.*

Within the discussion of values, a philosophy seemed evident as follows:

*CBMTG believes that every patient has a right of equal access to the highest quality of life saving care that can be provided by blood and marrow transplant professionals in Canada.*

## MISSION

The executive finalized the following mission statement

*The Canadian Blood and Marrow Transplant Group is the voice of experts working in the field of blood and marrow transplant.*

## VISION

The session on vision and mission was thoughtful and generative. The executive built on each other's ideas. The following vision was agreed upon:

*Canada will be the best place in the world to have a blood and marrow transplant.*

## STRATEGIC PRIORITIES

The strategic priorities for the organization were finalized at the January 11 and 12 meeting. These strategic priorities formed the basis of the action plan and are outlined below.

### EDUCATION

Providing high quality educational programs that advance the practice of blood and marrow transplantation in Canada.

### RESEARCH

Establish and organize an effective and sustainable research infrastructure for translational and clinical research.

### OUTREACH

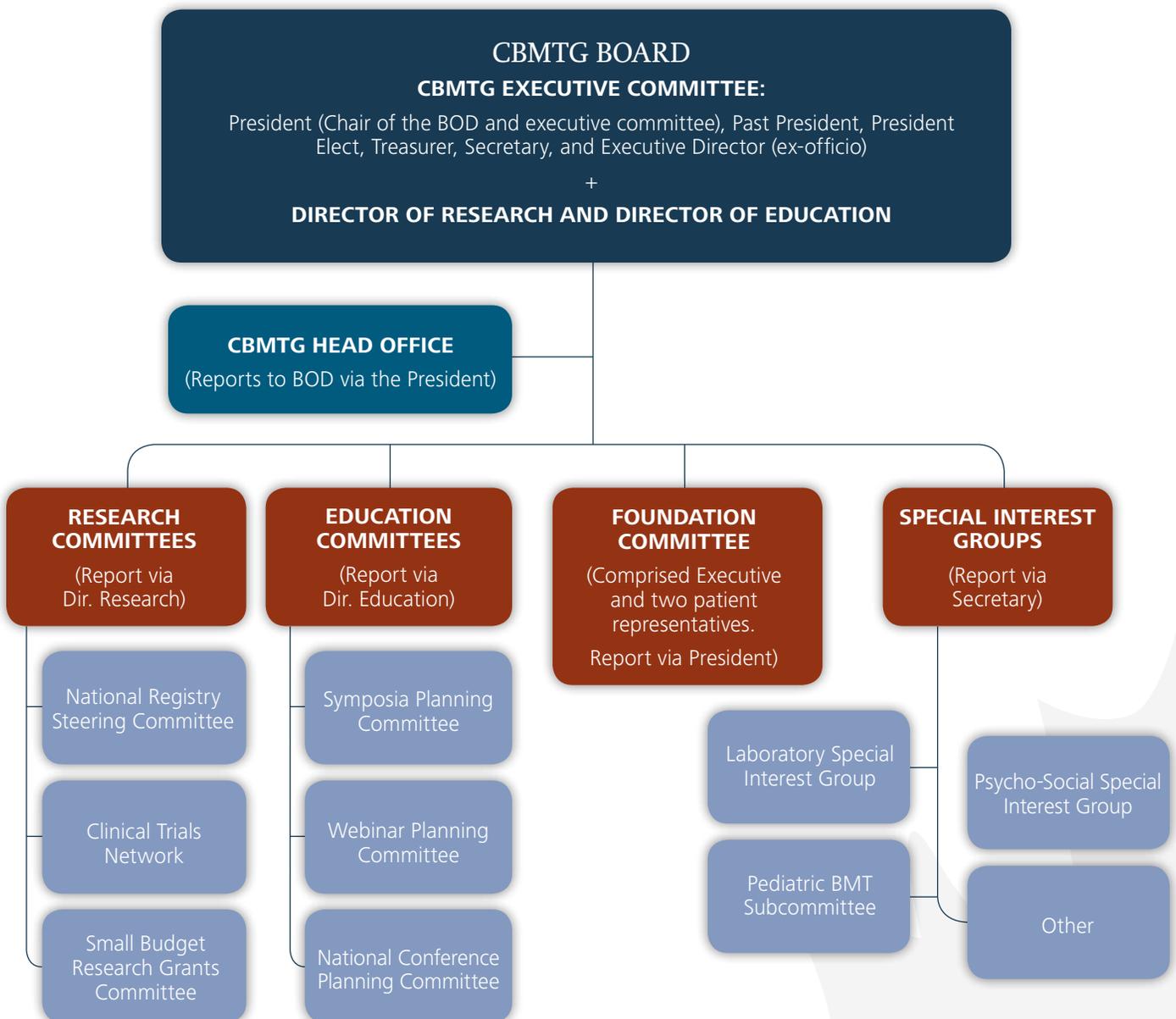
Increase the visibility and influence of CBMTG among members and the public.

### FINANCIAL CAPACITY

To support, education, research and outreach initiatives through fundraising, partnerships and the establishment of a charitable organization.

## ORGANIZATION STRUCTURE

During conversation about strategic direction questions about organization structure arose. The following organization structure was derived. The purpose of this new organization structure is to support the advancement of the strategic plan. Further details with regards to implementing this new structure can be found in the organization's governance manual.



## STRATEGY MAP

To complete the strategy map below, goals for each strategic direction and action plans developed by committees are needed.

### STRATEGY MAP 2014 – 2017 – STRATEGIC PLAN OVERVIEW

<b>MISSION</b>	The Canadian Blood and Marrow Transplant Group is the voice of experts working in the field of blood and marrow transplant.
<b>VISION</b>	Canada will be the best place in the world to have a blood and marrow transplant.
<b>VALUES</b>	CBMTG is committed to excellence, innovation, integrity, collaboration and professionalism in care, education and research in blood and marrow transplant.
<b>PHILOSOPHY</b>	CBMTG believes that every patient has a right of equal access to the highest quality of life saving care that can be provided by blood and marrow transplant professionals in Canada.

### STRATEGIC DIRECTIONS

<b>EDUCATION</b>	Providing high quality educational programs that advance the practice of blood and marrow transplantation in Canada.
<b>RESEARCH</b>	Establish and organize an effective and sustainable research infrastructure for translational and clinical research.
<b>OUTREACH</b>	Increase the visibility and influence of CBMTG among members and the public.
<b>FINANCIAL CAPACITY</b>	To support, education, research and outreach initiatives through fundraising, partnerships and the establishment of a charitable organization.

## APPENDIX 1: STRATEGIC ACTION PLAN

STRATEGIC PRIORITY	GOAL	ACTION ITEMS
<b>EDUCATION</b>	Providing high quality educational programs that advance the practice of blood and marrow transplantation in Canada	develop infrastructure for national conference
		evaluation of CBMTG's educational activities
		Provide online educational resources
		create standards and guidelines
		position CBMTG's annual conference as the focal point for other meetings
		investigate the feasibility/need to have BMT be recognized by the Royal College as a specialty
		examine the GVHD symposium planning structure
		maximize the use of Sosido; assess Sosido
<b>RESEARCH</b>	Establish and organize an effective and sustainable research infrastructure for translational and clinical research.	recruit and foster the development of new researchers
		support the CBMTG national registry
		support the development of infrastructure for national clinical trials program
<b>OUTREACH</b>	Increase the visibility and influence of CBMTG among members and the public.	develop an advocacy policy
		develop position statements on relevant issues with BMT
		develop strategy for how the association will engage with patients
		develop partnerships with relevant organizations – CBS, CANO, Héma-Québec
		strengthen ties with other transplant organizations (ASBMT, BMT CTN); investigate opportunities to train
		build awareness of CBMTG to granting agencies
		create an outreach policy
<b>FUNDRAISING</b>	To support, education, research and outreach initiatives through fundraising, partnerships and the establishment of a charitable organization	establish and implement an annual fundraising plan aimed at the general public
		create a public awareness campaign focused on how BMT care saves lives, finding donors, improving patient outcomes, highlighting that we are world leaders, providing hope to patients and family

## APPENDIX 2: SUMMARY OF INTERVIEWS

In total, six executive committee members, the executive director and two additional individuals who have had long relationships with CBMTG were interviewed. The interview guide had seven basic **SOAR** questions that most often elicited expansive, thoughtful answers.

- I. *What are the most important accomplishments of CBMTG over the past five years?*
- II. *What are the top three strengths of the organization?*
- III. *What three wishes would you have for the organization?*
- IV. *What are the most significant challenges CBMTG will face over the next few years? Rank the importance of these challenges (i.e., first, second, third, etc.).*
- V. *What are the most significant opportunities for CBMTG over the next few years?*
- VI. *What do members and potential members want most of all from CBMTG?*
- VII. *What results should CBMTG track and measure to inform its decision making?*

The interviews provided a great deal of good thinking that is summarized below in the **SOAR** Chart (Figure 1). The capitalized headings represent the themes heard frequently that emerged from the interviews. More detailed interview responses to the **SOAR** questions are presented below in the Appendix (Figure 2).

FIGURE 1.

STRENGTHS	OPPORTUNITIES & CHALLENGES
<ol style="list-style-type: none"> <li>1. SIZABLE INTERPROFESSIONAL MEMBERSHIP</li> <li>2. CLINICAL TRIALS</li> <li>3. BONE MARROW REGISTRY</li> <li>4. CONFERENCE</li> <li>5. PEOPLE, ORGANIZATION &amp; WORK</li> <li>6. FINANCIAL STATUS</li> <li>7. EDUCATION &amp; COMMUNICATION</li> </ol>	<ol style="list-style-type: none"> <li>1. GROWING MEMBERSHIP</li> <li>2. FUNDING</li> <li>3. BONE MARROW REGISTRY</li> <li>4. PARTNERSHIPS</li> <li>5. CONFERENCE APPEAL</li> <li>6. EDUCATIONAL RESOURCES</li> <li>7. NATIONAL AND INTERNATIONAL VISIBILITY</li> </ol>
ASPIRATIONS	RESULTS TO MEASURE
<ol style="list-style-type: none"> <li>1. CLARIFY DIRECTION</li> <li>2. GROW MEMBERSHIP</li> <li>3. FINANCIAL STABILITY</li> <li>4. PARTNERSHIPS</li> <li>5. ENHANCE COMMUNICATION</li> <li>6. STIMULATE RESEARCH</li> <li>7. ROYAL COLLEGE DESIGNATION</li> </ol>	<ol style="list-style-type: none"> <li>1. STRATEGIC PLAN IMPLEMENTATION</li> <li>2. FINANCIALS</li> <li>3. MEMBERSHIP</li> <li>4. COMMUNICATION &amp; EDUCATION</li> <li>5. CONFERENCE ATTENDANCE</li> <li>6. CLINICAL TRIALS</li> <li>7. HUMAN RESOURCES</li> </ol>

## APPENDIX 3: SUMMARY OF SURVEY

There were 44 responses to the survey representing about 25% of the CBMTG membership. This is an acceptable though not stellar response rate that does provide useful information to augment the interview findings. SurveyMonkey technology was used and respondents seem to find that relatively easy to use.

The *primary roles* of respondents are noted below:

Physicians	15	Lab Technologists	12
Researchers (PhD)	3	Social Workers	1
Nurses	9	Pharmacists	4

### RANKING OF CBMTG'S STRENGTHS

1. CBMTG MEMBER ACCESS TO SOSIDO	n=27
2. MEMBERSHIP VOICE	n=26
3. HIGH QUALITY EDUCATIONAL OPPORTUNITIES	n=25
4. ANNUAL CONFERENCE	n=24
5. RESPECTED NATIONALLY /INTERNATIONALLY	n=22
6. BONE MARROW REGISTRY	n=21
7. CLINICAL TRIALS/GRANTS	n=21
8. CBMTG COMMUNICATION TO MEMBERS	n=18

### OPPORTUNITIES & CHALLENGES IDENTIFIED BY RESPONDENTS

1. FUNDING ACTIVITIES	n=27
2. EXPAND EDUCATIONAL OPPORTUNITIES	n=24
3. DEVELOP PARTNERSHIPS WITH OTHER STEM CELL GROUPS	n=23
4. IMPROVE CBMTG COMMUNICATION TO MEMBERS	n=20
5. USE REGISTRY DATA TO INFLUENCE RESEARCH AND POLICY	n=19
6. DEVELOP PRACTICE SUPPORT	n=19
7. INCREASE MEMBERSHIP SIZE	n=18
8. DEVELOP & IMPLEMENT STANDARDS & GUIDELINES	n=15
9. INCREASE PUBLIC AWARENESS	n=15
10. PATIENT ADVOCACY	n=15
11. DEVELOP CUTTING EDGE RESEARCH PROPOSALS	n=13
12. ROYAL COLLEGE DESIGNATION AND ACCREDITATION	n=12

Plan to attend the CBMTG *Annual Conference* by professional group:

N=44	YES	NO	HAVEN'T DECIDED YET	REASONS FOR INDECISION
<b>Physicians</b> n=15 (34%)	47%	13%	40%	n=4 75% – schedule conflict 25% – lack of novel data
<b>Lab Techs</b> n=12 (27.3%)	25%	25%	50%	n=6 83% – not funded to attend 17% – lack of laboratory related items
<b>Nurses</b> n=9 (20.5%)	30%	30%	30%	n=4 50% – not funded to attend 25% – completing dissertation 25% – conference preferable once every 2 years due to other transplant conferences
<b>Pharmacist</b> n=4 (9.0%)			100%	n=2 100% – require shift coverage
<b>Researchers</b> n=3 (6.8%)	33%	33%	33%	n=2 50% – not funded to attend 50% – not best forum for presenting current data
<b>Social Worker</b> n=1 (2.3%)		100%		n=1 100% – Not enough content for Allied professionals in order to travel to another Province

#### RANKING THE BENEFITS OF CBMTG MEMBERSHIP

1. Interprofessional engagement & networking opportunities	n=31
2. Knowledge exchange	n=28
3. Educational opportunities	n=28
4. Annual conference participation	n=27
5. Access to bone marrow registry	n=9
6. Clinical trial participation and research grants	n=7

Survey respondents described the *Challenges* that CBMTG will face over the next 5 years:

- *Access to transplant type therapies for all patients who 'need' them.*
- *Maintaining interest with members in educational opportunities (speakers at the conference) and funding.*
- *Access to drugs.*
- *Meeting regulatory standards as they relate to practice.*
- *Funding, membership, research support, affiliation with other organizations for cross-communication, employment and research opportunities.*
- *Attendance at annual meetings may be low.*
- *Annual meeting seems to be too much, at least for people who attend ASH, ASBMT or EBMT. We could instead focus on working groups (pediatrics, GVHD, disease-oriented, immunotherapy) which meet more often to develop cutting edge research.*
- *Sustaining non-physician interest in future leadership as we seem to be exhausting committed physician interest.*
- *Attracting more allied health care professionals for annual conference if there is not more of a focus on 'whole-person'/partner care.*
- *Funding for educational activities and for research.*
- *Maintaining relevance re: non-physician members.*
- *Regarding the option: "Developing & implementing research standards and Guidelines" I think this is very important, but ranked on the low end of the scale compared to other items because research standards already exist (i.e., GCP, Tri-Council Policy and local institutional policies) that are followed when CBMTG projects are conducted. (However, if resources allowed, it would be great to formalize this within the CBMTG.)*

The environmental scan is food for thought. There is nothing conclusive about it, although it may be valuable insofar as it supports the thinking of some members of the board or, on the other hand, puts forward some surprising ideas that should be considered.



# CBMTG Strategic Plan 2014 to 2017



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