

## Moving on

A five-year organisational strategy  
for the British Society for Haematology (BSH)

Prepared by a working group of the BSH and  
Linda Laurance & Associates (LLA), published May 2016  
and rolled out in October 2016

Major Review and Update  
Undertaken by the Trustee Board and Chief Executive  
January - March 2019

## Vision and Mission Statements

At the heart of *Moving on* were statements about **Vision** (direction) and **Mission** (purpose) that were developed by a working group of the BSH Board in September 2015 and subsequently agreed by the full Board. The Board agreed in January 2019 to reverse the Vision and Mission statements.

The new Vision Statement is therefore a revised version of the former Mission Statement:

**BSH exists to transform patient care through excellence in the study, research and practice of haematology.**

The Mission Statement is now:

**BSH will be the UK hub for all haematology professionals and a voice for the specialty by:**

- providing and supporting multi-disciplinary education for students and professionals at all levels;
- raising standards of clinical care and laboratory practice through guidelines and the provision of expert advice;
- providing support for research via its publications, programmes and grants
- providing networking opportunities that bring haematology professionals together;
- representing the interests and concerns of haematology professionals at national and international levels

### Strategic aims

The Board also agreed to modify these in light of how the Society had developed since 2016 and in order to renew focus on science and research, almost entirely missing from the original plan and to incorporate better the international focus of some of its projects. These aims are:

- i. **Make BSH membership a must for all UK haematology professionals in practice, study and research**
- ii. **Maintain and build on BSH guidelines and education work thereby enabling science to be translated into best practice.**
- iii. **Transform the Annual Scientific Meeting into the go-to event for all UK haematology professionals ensuring it promotes the best in education, research and science.**
- iv. **Strengthen the voice of haematology at national and international levels**
- v. **Make sure the Society is sustainable in terms of culture, people and resources.**

***NB: We are currently half way through year 3 of the plan. Year 4 begins on 1 October 2019.***

***We have decided to launch a new strategic plan on 1 October 2020, so Year 5 of Moving on will effectively become Year 1 of the new strategy.***

**Strategic aim 1: Make BSH membership a must for all UK haematology professionals in practice, study and research**

<b>Specific objectives and supporting action plans</b>	<b>Timescales</b>
<b>1. Continue to develop membership package to include a range of interesting, different and attractive benefits that provide significant incentives for membership across the professions</b>	<b>Years 3-4</b>
Commission an agency to develop an imaginative and targeted membership offering relevant to all those whom we wish to join the Society. This work will include a major benchmarking study of BSH membership benefits against those of comparable societies, within and outside the UK and potentially outside the medical sphere.	Year 4, Q1 & Q2
Roll out the new package	Year 4, Q3
<b>2. Grow the total membership by 15% a year from Year 4 of the plan</b>	<b>Years 4-5</b>
Use mailing lists for events, grants, guidelines, SIGs, as a way of encouraging membership growth, by converting non-member recipients into members	
Conduct a comprehensive marketing campaign to promote the new membership offering to all existing and potential members, ensuring that we highlight the relevance of BSH membership across career stages, professions and geography.	Year 4, Q4
Build in regular membership marketing to the annual cycle of BSH activities.	Year 5/ Year 1 of new plan
<b>3. Work on ways to engage members more fully in the Society</b>	<b>Years 3-5</b>
Increase the range of opportunities for members to network with each other, thereby generating a “fellowship of BSH” vibe.	Year 4
Encourage members to: <ul style="list-style-type: none"> <li>• vote in Trustee Elections</li> <li>• become involved with the work of the Society by applying to join committees and SIGs, ad hoc projects</li> <li>• attend the ASM</li> </ul> <p>Launch a members’ “innovation and ideas award” in 2020</p>	Year 5/ into Year 1 of new Plan

**Key performance indicators**

- Membership recruitment figures, overall and by professional group
- Membership retention figures
- Level of membership response to communications
- Qualitative feedback from members
- Numbers of members engaging with the Society (e.g. committee volunteers, voting in Board Elections).
- Engagement with BJHaem and eJHaem

**Strategic aim 2: Maintain and build on BSH guidelines and education work thereby enabling science to be translated into best practice.**

<b>Specific objectives and supporting action plans (guidelines)</b>	<b>Timescales</b>
<b>1. Continue to work on linking the work of Guidelines and Education Committees</b>	<b>Years 3-5</b>
<ul style="list-style-type: none"> <li>• Produce podcasts of Guidelines (GLs)</li> <li>• Produce online resources based on GLs for the website</li> </ul>	Year 3 Qs 3-4
<b>2. Review the commissioning, writing and maintenance of the Guidelines to ensure the sustainability of the programme</b>	<b>Years 4-5</b>
<p>Commission an external review of the Guidelines processes and portfolio of work (e.g., Good practice papers (GPPs) and position papers (PPs) as well as full Guidelines) with a view to:</p> <ul style="list-style-type: none"> <li>• highlighting existing good practice;</li> <li>• making improvements if needed;</li> <li>• reviewing contribution by staff, medical writers and volunteers</li> <li>• future-proofing this invaluable resource and how the Society can best achieve this in terms of outlay of resources</li> </ul>	Year 4, Q2
Once the review is complete, develop a comprehensive induction programme for all involved	Year 5/ Year 1 of new plan

<b>Specific objectives and supporting action plans (education)</b>	<b>Timescales</b>
<b>1. Review the Society's current educational work (see above and also Aim 3) and work on best way to ensure we target members at all levels and across professions</b>	<b>Years 3-5</b>
<p>Develop and roll out an over-arching education strategy that includes:</p> <ul style="list-style-type: none"> <li>• Role of ASM in education (see also Aim 3)</li> <li>• Maintenance of online resources already in progress and development of future online resources aimed at all levels of training and professions</li> <li>• Use the BJH and new OA Journal as a vehicle for showcasing the best in UK education, science and research</li> <li>• Development by Education and Guidelines Committees of the GLs as an educational tool, including in conjunction with the new EiC, <i>BJHaem</i></li> <li>• Planned programme of relevant, targeted and high quality national education days throughout the year ensuring some are outside London</li> <li>• Consideration of how best to meet future needs of haematology professionals e.g. with regard to genomic medicine; reflecting the needs of the MDT, levels of training etc..</li> <li>• Ensure that the BSH Committees and Office are able to deliver in terms of staffing, finance and other resource needs.</li> </ul>	Year 3, Q4 & Year 4 Qs 1 to develop  Year 4 Q2 onwards and Year 5/ Year 1 of new plan, to roll-out
<b>2. Support local educational initiatives via meetings grants to regional leads and other members</b>	<b>Years 4-5</b>

Extend the meetings grants into a local fund to which members can apply for monies for local meetings. Consult both the Scientific and Publications and Education Committees in discussions on how to set up and manage this fund and ensure criteria for BSH support includes not duplicating existing meetings.  Publicise the fund to members.	Year 4 to set up  and Year 5/ Year 1 of new plan to roll out
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### Key performance indicators

- Feedback on joint working between Education and Guidelines Committee
- Download figures for and feedback on Guidelines
- A future-proof, sufficiently-resourced and supported Guidelines process
- Take-up of educational courses by all groups of participants
- Qualitative feedback from course participants
- Feedback on provision of online education resources
- Feedback on content of Journals

**Strategic aim 3: Transform the Annual Scientific Meeting (ASM) into the go-to event for all UK haematology professionals ensuring it promotes the best in education, research and science.**

Specific objectives and supporting action plans	Timescales
<b>1. Commission external consultants to conduct a comprehensive evaluation process of the past three meetings (2017-19) to inform the content, conduct, format and sustainability of future ASMs.</b>	<b>Year 3</b>
External consultants to review effectiveness of PCO; Programme Committee; Communications and promotion; Finance, staffing and governance; and to evaluate delegate feedback on the content and format of recent meetings. The review should also include advice on how to ensure the move to the Sun-Tues timeslot in 2021 is a success.	Year 3, Q4
Beef up science and research content for 2020 anniversary meeting: e.g. via the 60 at 60 exhibition; showcasing work by grant awardees (in session and via film); showcasing BJHaem and eJHaem; and ensure we build on this for future ASMs.	Year 3, Q4 and Year 4 Qs 1-2
<b>2. Commission external consultants to do a benchmarking exercise on how other organisations attract participants to their meetings, particularly scientists, nurses and AHPs</b>	<b>Year 4, Q1</b>
Consultants to review other societies' meetings programmes; use of communications and promotions; innovations that BSH could consider adopting (e.g. technology); financial models etc.	
<b>3. Roll out findings of external reviews in 2020</b> This will help with 2021 meeting which moves to a Sun-Tues timeslot	<b>Years 4/5</b>

### Key performance indicators

- Overall ASM attendance figures
- Attendance figures by professional group
- Level and quality of response to post-meeting evaluation
- Profitability of the meeting.

### Strategic aim 4: Strengthen the voice of haematology at national and international levels

Specific objectives and supporting action plans	Timescales
<b>1. Strengthen links with Royal Colleges and other key UK influencing bodies to enhance the representation of haematology within their plans</b>	Years 3-5
Build on the Work Force Review when it is published in summer 2019 and use it to highlight areas of concern and interest to members and to raise these in the appropriate national <i>fora</i>	Year 3, Q4
Map out current formal links between BSH and relevant national influencing bodies: what needs strengthening; are there any obvious gaps?	Year 3, Q4
<b>2. Develop a framework for potential collaboration between the Society and sub-specialty groups and related charities</b>	Year 3, Q4 Year 4, Q1
If the framework seems feasible, roll it out.	Year 4, Q2
<b>3. Work to strengthen the education and practice of haematology at international level</b>	Years 3-5
Extend the influence of the Society via international partnerships eg with ASH and EHA via work already underway: <ul style="list-style-type: none"><li>• ASH-BSH Plenary Sessions at ASM;</li><li>• Guidelines and potential work such as</li><li>• The proposed joint membership with EHA</li><li>• ASH African Sickle Cell Consortium</li><li>• Work with other international societies</li></ul>	Year 3  Year 4
Continue the work of the Society's Global SIG with LMICs partners already underway or under consideration i.e. <ul style="list-style-type: none"><li>• Plenary speakers Scheme</li><li>• HVO pilot scheme</li><li>• Proposal for visit to Zambia</li></ul>	Year 3, Q3 & Q4 into Year 4

### Key performance indicators

- Stronger links with political influencers and a greater voice for the discipline
- Increased overseas membership
- Increased engagement and involvement of members

## Strategic aim 5: Make sure the Society is sustainable in terms of culture, people and resources

Specific objectives and supporting action plans	Timescales
<b>1. Consider the overall HR implications of this strategic plan and make sure the staff team are adequately resourced to deliver it</b>	<b>Year 3</b>
Assess and cost out the additional capacity needed to deliver the plan; including <ul style="list-style-type: none"> <li>temporary staff roles becoming permanent</li> <li>additional roles (e.g. proposed senior Education role) whether work could be handled by consultants rather than in-house staff (e.g., external affairs work)</li> </ul>	Year 3 Qs 3 & 4
Ensure BSH is a good employer that supports, develops and challenges its staff by <ul style="list-style-type: none"> <li>Providing a good working environment that takes account of the varying needs of staff members</li> <li>Having in place all necessary policies and procedures (HR, H&amp;S etc)</li> <li>Encouraging staff to attend relevant training and development courses</li> <li>Appraising staff honestly and fairly</li> <li>Paying staff in accordance with their skills and abilities and the needs of the Society</li> </ul>	
<b>2. Review the Board subcommittee and SIG structure to ensure effective governance of the Society</b>	<b>Years 3-5</b>
Review the Board subcommittees: do they all need to be formal subcommittees of the Board? Many are largely operational, not strategic in their work.  Do we have the right mix and balance of members on the SIGs and Subcommittees?	Year 3, Q3
Create robust project approval and reporting systems for Subcommittees and SIGs, via the BSH office team	Year 3, Q4
<b>3. Develop robust finance, risk and compliance procedures (including info governance) across the Society</b>	<b>Years 3-5</b>
Continue to work on internal financial and other key operational policies and procedures	Year 3, Qs 3&4
Ensure the involvement of staff, committees and SIGs in the financial aspects of the strategy	Year 3, Q4
Consider the need to invest some of the surplus reserves in various funds eg for property, grants, education etc.	Year 3, Q4
<b>4. Set up a working group to consider possibilities for generating additional income for the Society</b>	<b>Years 4-5</b>
Look at ways to generate more income from current activities, including subscriptions, ASM and educational events	Year 4
Investigate potential new income-generating activities	Year 5

### **Key performance indicators**

- Staff recruitment, retention, performance and satisfaction
  - Effective management of budget and forecasts throughout the year
  - Depletion of reserves in accordance with policy
  - Maintain funding from new and existing income streams
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### **2020**

In the foregoing, I have made occasional references to the Society's 60th birthday, but there is no one aim into which all the plans for the 2020 celebrations will fit. The project will cut across everything that the BSH does over the next 18-24 months.

### **Next steps**

- Committee and SIG Chairs, regional leads and some board members and staff to meet on 2 April 2019 at ASM to discuss
- Board to give final sign off on 3 April
- Roll out, mid-April 2019