



Strategic Planning for NPCs

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Session Objectives

- Introduce a **simple, effective** strategic planning process
- Learn to **focus resources**, reduce waste and **improve outcomes**
- Consider ways to create a strategic plan in the **NPC environment**

Why Bother with a Strategic Plan?



Strategic Components

- Mission/Vision Statements
- SWOT
- Strategic Plan
- Budget



Mission Statement: **What You *Do or* What You *Create***

XYZ offers (what kind of) services
to (segments of) community in
the (geographic/category) area.



Strategic Plan Process

- SWOT
- Goals
- Strategies
- Tactics
- Action Plan



SWOT

- Strengths
- Weaknesses
- Opportunities
- Threats



Strengths

- What is your organization good at?
- What programs work well for you?

- What kind of business comes easiest?
- What are your best segments?



Strengths

- Note organizational strengths
- Think staff, resources, member base, programs, talents, points of difference



Weaknesses

- What mistakes are made repeatedly?
 - What has caused projects to fail?
-
- What types of programs are most difficult?
 - What mistakes have been made recently?

Opportunities

**More
Capacity**

Registries

**Clinical
Trials**

Grants

**New
Disease
Areas**

New PIs

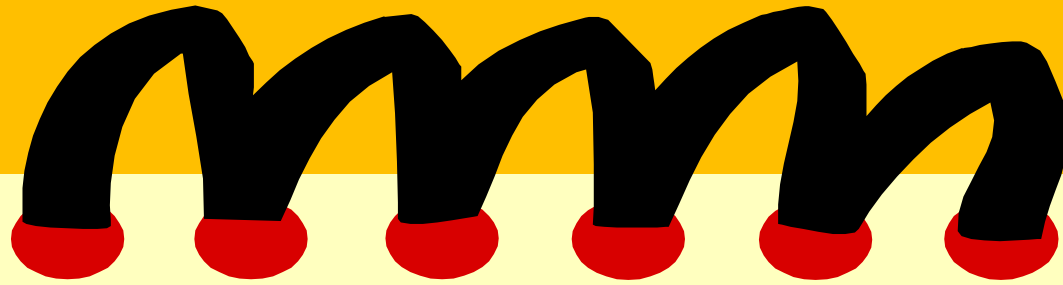
Where can
you grow?



Threats

- What external events could halt your plans?
 - Focus where you have influence
 - Look at specifics in the economy
- Consider natural disasters

PRIORITIZING



- Assign dots to the 10 most important items
- Work across entire SWOT

THEN...

- Make note of the *business areas of focus* where most priorities appear

TOP LEVEL GOALS

- Revenue/Reserves
- Employee Hiring/Retention
- Clinical Trial Management
- Grant Development
- Investigator Development
- Product Mix
- Professional Development



TOP LEVEL GOALS

- Goal statements
- One per area of focus
- Focus on 'what'... not 'how'
- Long view - 3 years



RESEARCH PRODUCTION

GOAL EXAMPLES

- NPCX has a wide range of clinical trials, grants and research projects, spanning many disease areas.
- NPCX manages a robust number of grants, run by a large roster of investigators.





EXAMPLE STRATEGIES

➤ **Clinical Trial Management**

- Consistently meet or exceed recruitment goals
- Minimal protocol deviations
- Efficient management of regulatory systems
- Highly respected, popular research site

Strategic Action Calendar

Q1 2023	Q2 2023	Q3 2023	Q4 2023
<ul style="list-style-type: none">• A digest of action items written by calendar quarters• Drawn directly from your strategies• Attach to management meeting agendas• Update quarterly or more often• Treat as a living document• Helps keep team tied to strategic plan			

Strategic Action Calendar

	Q1 20	Q2 2012	Q3 2012	Q4 2012
Area of Focus (Research Production)	>Action item >Date >Driver	>Action item >Date >Driver	>Action item >Date >Driver	>Action item >Date >Driver
Area of Focus (Staff Development)	>Action item >Date >Driver	>Action item >Date >Driver	>Action item >Date >Driver	>Action item >Date >Driver
Area of Focus (Hiring and Retention)	>Action item >Date >Driver	>Action item >Date >Driver	>Action item >Date >Driver	>Action item >Date >Driver

Strategic Action Plan Example

Strategy	Next Step	Driver	Due Date
Market research opportunities to medical center community	>Develop list of recipients	ED	Q1 FY23
	>Begin sending emails as opportunities arise	ED	Ongoing
Explore additional opportunities with sponsors	>Begin building relationships with current sponsor medical liaisons >Invite medical liaisons for site tours	ED/Grant Manager	Start Q1 FY23/Ongoing

Understand Your Revenues

- Total revenues
- Percent of total recruitment
- Income vs labor costs
- Average revenue per project
- Average revenue per disease area
- Average revenue per PI
- Total revenue per coordinator
- Product mix





Creating a Strategic Plan in the NPC Environment

➤ **Challenges**

- Difficult to get Board for full day
- Some Board members won't see the need/unwilling to invest the time

➤ **Workarounds**

- Consider task force
 - 2-4 Board members/stakeholders
- Admin staff creates draft for Board input
- Work on sections progressively



- ✦ Plan time to work **ON** your business, not just **IN** your business
- ✦ **Recognize** and address strengths and weaknesses
- ✦ **Choose** your goals
- ✦ **Focus** team energy





Thank you!

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**Certified, Practice of Research Administration
and Management**

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