



Canadian Health Services
Research Foundation (CHSRF)

2007-2009 Strategic Plan



Canadian Health Services Research **Foundation**
Fondation canadienne de la recherche sur les services de santé

STATEMENT OF INSTITUTIONAL PURPOSE

Vision:

A strong Canadian healthcare system driven by solid, research-informed management and policy decisions

Mission:

To support evidence-informed decision-making in the organization, management, and delivery of health services through funding research, building capacity, and transferring knowledge

Strategy:

To bring researchers and decision makers together regularly to understand each other's goals and professional culture, influence each other's work, and forge new partnerships

Strategic Objectives:

1. To create high-quality new knowledge that is useful for health service managers and policy makers (especially in the foundation's priority theme areas)
2. To increase the number and nature of applied health services and nursing researchers
3. To get needed research into the hands of health system managers and policy makers in the right format, at the right time, through the right channels
4. To help health system managers, policy makers, and their organizations to routinely acquire, appraise, adapt, and apply relevant research in their work

Operating Principles:

1. Innovation
2. Collaboration
3. Transparency
4. Flexibility

2007 – 2009 STRATEGIC PLAN

Looking Back and Looking Forward — 2007 as a Year in Transition

The 2007-2009 strategic plan is an opportunity for the foundation to build on its successes in an environment that has become both increasingly crowded and more attuned to its concepts such as linkage and exchange. 2007 is therefore an opportune time to take stock and decide what should and should not be part of our future plans. Three key foundation events support this approach for 2007:

- ❖ The inaugural CEO will retire in 2007 and a new CEO will be appointed with, presumably, his or her own ideas for the future of the foundation.
- ❖ The second quinquennial international review of the foundation will assess our progress in achieving our mission of supporting evidence-informed decision-making in the health sector and make recommendations for the future.
- ❖ The 10th anniversary conference will not only reflect on the influence of our ideas and programs in the last 10 years but also explore ideas to influence evidence-informed decision-making in the next 10 years.

In addition, the triennial *Listening for Direction* national exercise on health services and policy priorities will occur for the third time in 2007. Co-led by the foundation (with the Institute of Health Services and Policy Research, Canadian Institutes of Health Research), this national consultation to reaffirm/refresh the list of key health system issues and associated research priorities will include six other national partners, two of whom are new to *Listening for Direction III*. Along with the outputs from the three key events above, the final report will be available in June 2007. Hence, the June retreat of trustees will provide an opportunity to consider all these inputs and their implications for any modifications to our existing trajectory, themes, programs, and activities.

Therefore, in order to allow these events to inform the foundation's future directions, the guiding principles for the 2007-2009 strategic plan are:

- ❖ no major trajectory changes from the 2006-2008 strategic plan;
- ❖ increased financial and programming flexibility to respond to the possible outcomes of the new CEO, the international review panel, the 10th anniversary conference, and *Listening for Direction III*; and
- ❖ building on existing synergies between the foundation's programs.

To reinforce our existing trajectory, the priority areas for 2007 will be:

Strategic Objective #1 — Creating New Knowledge

1. Revise and implement an evidence-informed process for creating research syntheses for health sector managers and policy makers.

Strategic Objective #2 — Research Capacity Development

2. Consolidate and delivery programs for the applied scholarship of health services research at conceptual and practical levels.

Strategic Objective #4 — Decision Maker Capacity Development/Research Use

3. Organize and hold Research Use Week events.

Organizational Excellence — Corporate Communications

4. Brand the foundation to clearly distinguish it from similar organizations.
5. Provide communications support for the foundation's strategic objective activities, programs, and events.

Organizational Excellence — Program Support

6. Consolidate and provide ongoing management of grants and awards processes and potentially expand externally.

Organizational Excellence — Employee Support

7. Design and implement revised recruitment and retention strategies.

Introduction

In 10 years, the foundation has come a long way from its beginnings in 1997 as a small organization. It is now a significant presence with an enviable record in helping applied health services researchers, decision makers, and similar health-related organizations to understand the need for and importance of evidence-informed decision-making in health services. During these years, the foundation has evolved. Between 1997 and 2003, we earned a reputation as an innovator in research funding and became well-known and credible in the applied health services and nursing research communities. We also had an international impact among other research funding organizations. At that time, the landscape of health-related knowledge organizations at the federal, provincial, or national level consisted of approximately nine organizations. In 2003, we recognized the need to increase our profile with, and services to, health system managers and policy makers, and to consolidate our research funding programs into ones that both complement those of the Canadian Institutes of Health Research and other organizations and provide added value for the decision-making community.

Over the years, the foundation's innovation incubator role has contributed significantly to the way researchers and decision makers conduct their work today, and its impact has been recognized on many levels:

- ❖ On the research side, we have designed our research programs to create a supportive environment for researchers to engage with decision makers by creating new knowledge and building critical mass in applied health services and nursing research.
- ❖ On the system side, we have addressed the needs of decision makers by providing them with the training and tools necessary to facilitate the use of research in their work.

- ❖ On the health landscape at large, we have influenced a number of similar health-related organizations in how they conduct their work — from mirroring the foundation’s research program design models to embedding the “linkage and exchange” philosophy within their organizations.

Today, there are approximately 20 federal, provincial, or national health-related knowledge organizations, making it even more important for us to distinguish ourselves and our niche in the future.

The 2007-2009 strategic plan will offer us an opportunity to build on our previous plans, reflect on our successes and failures, and evolve further into the next decade — with continued focus on our two main pillars of activity:

1. research granting and commissioning; and
 2. knowledge transfer and exchange
- with the cross-cutting enabling activity:
3. organizational excellence.

In the remainder of the strategic plan, the main risks and opportunities for the foundation are linked to current and emerging audiences for our work. The major areas of planned activity for 2007-2009 are then outlined (with more detail provided in Appendix 1, grouped under the strategic objectives and accompanied by explicit desired outcomes for the period). This is followed by the 2007 operational plan and the 2007 budget. A final appendix provides the corporate planning framework and its relationship to our logic model and our enterprise risk management analysis.

Audiences, Risks, and Opportunities for 2007-2009

The foundation will focus on its relationship with five audiences in 2007-2009.

1. Researchers and their organizations

To keep pace with the changing external environment and to better align the foundation’s research programs with strategic priorities, new opportunities, and existing initiatives, the foundation will modify, adapt, or refine its programs by focusing on critical shifts at the margin of the previous strategic plan. The intent is to provide some strategic themes for research programs to help **unify the various programs within a common purpose**.

In 2007-2009:

- ❖ The foundation will modify or expand its research programming to ensure it continues to be relevant to the healthcare system, rigorous in its methodology, responsive to decision makers, and provides adequate reward and recognition for the work in applied health services research.
- ❖ The foundation will focus its research production and related activities on the decision support needs of the healthcare system. This includes activities within the granting and commissioning portfolio (Research, Exchange, and Impact for System Support (REISS) competition; scoping and scanning projects; commissioned research; and, in particular, the synthesis program) and other initiatives led by the theme officers, such as the development of knowledge networks.

- ❖ The foundation will focus its attention on the need to enhance support for the applied health services research community at conceptual and practical levels after pushing at the methodological and capacity development boundaries for applied health services research. This will be achieved, for example, by articulating an expanded notion of scholarship for applied health services research and social innovation; considering ways to support research careers outside of the academic setting; and expanding the type of career options for researchers.

2. *Managers, policy makers, and their organizations*

Growth in the number of health-related knowledge organizations has resulted in a pressing need for the foundation to **sharpen the focus of its knowledge transfer and exchange programming.**

In 2007-2009:

- ❖ The foundation will become a key player in meeting the research evidence needs of Canadian health system decision makers by implementing a new dissemination strategy, refining and expanding its summaries program, and reorienting its networks and exchanges programs.
- ❖ The foundation will provide decision makers with access to a comprehensive suite of resources for evidence-informed decision-making using vehicles such as a web-based resource inventory, our Research Use Weeks program, and our Promising Practices inventory.
- ❖ The foundation will encourage and enable decision makers and their organizations to invest in the structures, processes, and people necessary for successful evidence-informed decision-making through increased investments in capacity development programs for decision makers.
- ❖ The foundation will be at the centre of a Canadian knowledge transfer and exchange community in which the players work together in a complementary way and understand each other's relative contributions and roles.

Our added value relative to other health-related knowledge organizations is our unique vision of knowledge transfer and exchange in the healthcare context:

Knowledge transfer and exchange (KTE) is the result of all the things we do to increase the likelihood that research-based evidence will inform decisions made (by either individuals or organizations) about:

- *the clinical care and other services we receive;*
- *how the health system is managed; or*
- *what policies are used to govern it.*

This is supported with a focus on directly meeting the evidence needs of those working in the health system by:

- ❖ developing programs that disseminate to them relevant and needed research evidence;
- ❖ investing in tools and resources that make it easier for them to find and use research evidence; and
- ❖ delivering innovative programs that improve individuals' and organizations' capacity to do evidence-informed decision-making.

A constant across each of these areas is our philosophy of linkage and exchange, which means always incorporating elements of face-to-face interaction in our programs.

The underlying premise is that for the foundation to contribute to its central vision — a strong Canadian healthcare system that is driven by solid, research-informed management and policy decisions — managers and policy makers in Canadian healthcare systems must be aware of, use, and value the foundation's outputs and its role in supporting evidence-informed decision-making.

3. *Funders, partners, and other health-related related knowledge organizations*

Today, there are approximately 20 federal, provincial, or national health-related knowledge organizations contributing to a strong Canadian healthcare system. While this is great for the healthcare system and recognizes the importance of health in our lives, it makes it difficult for organizations to distinguish themselves. As is demonstrated annually in our *Partnerships Report*, working with other organizations is central to the foundation's success and contributes to reducing duplication in the system. Over the next three years, we will review our partnering activities in research programs and identify areas for **strengthening our collaborative and complementary work**. In knowledge transfer and exchange, we will **expand our partnering activities to identify opportunities for both joint dissemination and joint delivery of linkage and exchange events**.

4. *The public*

Until 2006, the public was not viewed as a primary audience by the foundation. In 2006, however, some initial explorations of how to connect to this audience were implemented. The foundation worked with the Health Council of Canada, the Canadian Patient Safety Institute, and the Saskatchewan Health Quality Council on public reporting. Building on this experience, we will continue to look at what it would mean for us to involve the public in our work. The methodology of much of our work is the linkage and exchange model — bringing researchers and decision makers together regularly so they better understand each other and are able to better influence each other. Given our experience bridging these two communities, we will explore whether the **linkage and exchange strategy** would work with the public. Over the next three years, we will **explore how to use the media to communicate some of our research and research synthesis results to the public** to counteract both the myths generated by others and the lack of transparency with information by some governments. We will also explore some tools that can be developed to assist regional health authorities and ourselves in effective engagement of the public for input on specific issues and for contributions to governance.

5. *Foundation staff and suppliers*

At the foundation, we recognize the knowledge, skills, and abilities of our highly educated workforce are paramount to the successful achievement of our mandate. In 2006, the foundation was recognized as one of the 30 best workplaces in Canada and one of Ottawa's top 15 employers. The foundation also began to reorganize its internal structure to focus more clearly on providing tools and services for decision makers, at both the organizational and individual levels, to do evidence-informed decision-making. To simplify and focus these efforts, the knowledge transfer and exchange unit was consolidated into three areas of activity — dissemination, executive training, and research use.

Over the next three years, the foundation will continue to **recruit and retain high-quality, value-added knowledge workers** by creating long-term organizational capacity through training and career development. We will continue to create a **highly desirable workplace** that values its staff and their achievements. We will explore organizational models that provide career progression and succession. In particular, the foundation will change internal organizational structure to mirror the message given to those outside, that is, “research” and “knowledge transfer and exchange” are interlinked and inseparable processes for the applied research enterprise.

The growing society-wide interest in **improved forms of governance and accountability** require the foundation to improve its policies and procedures, its use and retention of corporate tacit knowledge, and its internal and external reporting systems using enhanced knowledge management and information technology systems.

Main Activities Under the 2007-2009 Strategic Plan

(See Appendix 1 for a more detailed description of programs and desired outcomes for 2007-2009.)

Highlights of the core activities under *research programs* are:

- better serve decision makers through implementation of the newly revised “decision support” syntheses and the development of a “rapid response” service focusing on the decision support needs of policy makers;
- continue development of the flagship granting program Research, Exchange, and Impact for System Support (REISS), including consideration of funding to promote the implementation of particular findings;
- modify the Capacity for Applied and Developmental Research and Evaluation (CADRE) training program in response to its mid-term external evaluation, and explore similar personnel support for applied researchers working in decision-making organizations;
- expand support for applied scholarship in academic and non-academic settings, including ways to improve recognition by universities and decision-making organizations of the value of applied research activities and the needs of applied researchers;
- lead the national *Listening for Direction III* consultation on priority health system issues and implement its implications for the foundation; and
- respond to the mid-term evaluation of the Nursing Care Partnership program with the Canadian Nurses Foundation by implementing any recommended changes.

Highlights of the core activities under *knowledge transfer and exchange* are:

- reorganize dissemination activities to use summaries, exchanges, networks, and partnerships in a more co-ordinated fashion to support and advocate for evidence-informed decision-making;

- improve the summaries program with more direct, systematic input from health services researchers to *Mythbusters* and a speedier response of *Evidence Boost* to the priorities of managers, especially when these are in our priority themes;
- create a new *Knowledge Transfer and Exchange Digest* series which consolidates the knowledge previously communicated in *Networks Digest* and *Brokering Digest*;
- continue development of the Promising Practices Inventory, which shares the learnings of other organizations that have improved their capacity to do evidence-informed decision-making, and create additional web-based repositories of supporting tools and resources;
- continue offering regional Research Use Weeks and create communities of practice (such as for those graduating from the EXTRA program) to engage more decision makers and make them aware of our and others' tools and resources that support evidence-informed decision-making;
- modify the Executive Training for Research Application (EXTRA) program to better achieve organizational change as well as individual capacity for evidence-informed decision-making, for example, an organizational application stream and a CEO network; and
- transform the knowledge brokering program to focus primarily on individuals working within decision-making organizations.

Highlights of the support activities under ***organizational excellence*** are:

- explore and implement an organizational model to better align the foundation's internal structure with its external message that "research" and "knowledge transfer and exchange" are inseparable;
- consolidate our merit review process for grants and awards and potentially expand it to an external national service role;
- enhance internal and external financial and accountability reporting systems;
- increase the profile of the foundation by communicating the foundation's niche more widely and positioning it within the crowded landscape of health-related knowledge organizations;
- develop a strategic plan for evaluation, including both program evaluation and overall assessment of impact;
- implement new recruitment and retention strategies to maintain our reputation as a leading employer in Canada and address the challenge posed by the shortage of knowledge workers; and
- explore sustainability strategies with new funding requests prepared in the context of governments' narrower, product-line, and granting approach to future program funding.