the clarion group
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SLEEP RESEARCH SOCIETY

STRATEGY UPDATE MEETING SUMMARY

AUGUST 8, 2018

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Sleep Research Society
Strategy Update Session
Meeting Summary: August 8, 2018

Introduction

Dr. Andrew Krystal, President of the Sleep Research Society (SRS), welcomed participants to the strategic planning session. He thanked them for their participation and made the following opening remarks:

- The SRS strategic plan has driven our direction in an effective way.
- We've accomplished much, including:
  - Acquisition of and improvements to the Journal
  - Heightened fundraising
  - Early career training
  - We're improving our scientific offerings.
  - We're in a different place than we were four years ago.
- We need to update the SRS strategy in the context of our accomplishments and what has changed over the past years.

Andy then introduced Laurie Schulte of The Clarion Group and invited her to facilitate the session.

Laurie outlined the agenda for the session:

- Review progress with implementing SRS's 2014-2018 strategic map.
- Update the strategic map for the next four years.
- Identify implementation priorities for the next 12 months of the strategic plan period.

Overview of Strategic Effectiveness

Laurie Schulte provided an overview of strategic effectiveness – an organization's ability to set the right goals and consistently achieve them.

Organizations with high strategic effectiveness:

- Quickly formulate a "good enough" strategic plan.
- Move immediately to implementation – letting implementation teach them the ways that the strategy is on target and the ways it needs to be improved.
- Review progress on implementation regularly with honesty and candor.
- Make needed adjustments based on what is working, what isn't, and how the world has changed.
- Focus on results, not activities.

Reviewing Progress with Implementing the 2014-2018 Strategic Map

Sean Drummond, immediate Past President of the Sleep Research Society, addressed questions and comments about progress with implementing SRS's 2014-2018 strategic map, attached below (double click to open):

Color coded map 2.pdf

Discussion included the following points.

- In addition to sister societies, SRS should consider partnering with affiliated non-sleep societies.
- SRS needs to define more concretely what it means by international engagement; this should include increasing the number of international members in SRS leadership roles.
- SRS's training must meet current needs, including those outside of academia. It should support "alternative career paths" as worthy options.
- Diversity, in all of its forms, should be reflected more overtly in the strategic map.
- Should SRS go outside the field for members?
  - SRS has pursued sleep researchers who aren't members, with little success.
  - It has worked less on attracting researchers outside the direct field.

Participants then met in small groups to consider the following questions:

- What implementation accomplishments should SRS build on in its next strategic plan?
- What gaps with implementation, if any, will need to be filled?
- What are the critical issues facing SRS over the next three years?

Each group considered these questions in the context of one of the strategic priorities on the SRS strategic map. A summary of the small group reports follows.

Implementation Accomplishments to Build on in the Next Strategic Plan

Group 1 – Strategic Priority A: Strengthen Membership Communication and Engagement

- Continue to expand member benefits.
  - Guidelines
  - Toolkits
  - Methods papers

- Expand benefits to "technology-focused" scientists, e.g.:
  - Engineering
  - Radiology
  - Etc.
- Continue communication strategies as communication technology evolves (e.g., social media).
  - Make sure it works and is kept up to date.
  - Better promote research articles and press releases.
- Re: member sense of ownership:
  - Representation at other conferences
  - PhD symposiums
  - Provide information on SRS benefits to other conference attendees (especially trainees).
- Continue to expand member recognition.
  - Newsletter
  - Twitter
  - Etc.
- Lab directory – include accomplishments?
- Share in press releases.

GROUP 2 – STRATEGIC PRIORITY B: MAXIMIZE IMPACT OF ADVOCACY AND OUTREACH

- Strategic engagement of lobbyists
- Patient advocates
- Increased visits to NIH campus/institutes
- Build on Dale's knowledge (other scientists, too).
- Response to governmental/NIH RFIs

GROUP 3 – STRATEGIC PRIORITY C: ENHANCE VIBRANCY OF SCIENTIFIC OFFERINGS

- Enormous success of sleep journal
  - Purchase
  - Improvements in how it's managed
  - Benefits for members
    - Tweet
    - Email
    - Trainee piece
  - Rapid review for reviewers
- The new SRS meeting – it's "ours"
- APSS meeting improvements – more autonomy over research seminars

GROUP 4 – STRATEGIC PRIORITY D: STRENGTHEN THE QUALITY OF CAREER DEVELOPMENT PROGRAMS AND SERVICES

- Trainee day
- Educational offerings
- Trainee recognition
- Lots of "green" in the color-coded strategic map reflecting accomplishments
- Physician scientist progress (pulmonary)

GROUP 5 – STRATEGIC PRIORITY E: INCREASE RESOURCES TO ACHIEVE GOALS

- There are no "green" boxes on the color-coded strategic map: there is a lot of work still to do regarding revenue.
- There are the beginnings of accomplishments that can be built on, including:
  - Moderate progress with academic physicians
  - Fair progress with non-clinician training
  - Fair progress with training and education conferences

Implementation Gaps that Will Need to Be Filled

GROUP 1

- How to engage internationally
- Presence at sleep-related conferences
- Trainee page on Facebook is private.
  - Make public?
  - Or add another page on the website.

GROUP 2

- Fostering NIH relationships and interactions
- Non-NIH
  - NASA
  - Veterans Administration
  - CDC
  - Department of Defense

GROUP 3

- In the Journal, bring forward more high-impact science from senior researchers.
- White papers in our and other journals
- Warehouse for regional meetings
  - Smaller schools; pipeline at smaller schools
  - Presentations by undergraduates doing sleep research
- Partnering with the American Statistical Society
- Next conference: public health
  - Increase late breaking at Data Blitz.
  - 10-15 posters

GROUP 4

- Connecting with other societies
- Interest from unestablished labs
- International trainee engagement
- Mid-career level training
  - Managing labs
  - Personnel opportunities
- Recruiting the next generation
  - Undergraduates

  - High schoolers
- Track the number of trainee day participants that:
  - Stay in the field
  - Become SRS members
- Training partnerships with industry
- Continue to grow physician researcher engagement, particularly neurology.

GROUP 5

- Increase financial resources.
  - New
  - Membership
  - Increased meeting attendees
    - Corporate
    - Stakeholders
    - Members
    - Sciences
  - Speakers bureau
  - Targeted workshops
    - HR
    - Fatigue
    - Retirees
    - Insurance
    - Health
  - Identify and develop products for non-traditional groups.
- Better engage those with financial resources; bring value to these groups.
- Resources/infrastructure to engage the public (e.g., "Got Sleep?")
- Other thoughts on engagement include:
  - Industry
    - Safety/fatigue management
    - Pharmaceutical
    - Devices
  - Government
    - CDC
    - FDA
    - NIH
  - AARP
  - Health and wellness program
    - Employee
    - Non-employee

Critical Issues Facing SRS over the Next Three Years

GROUP 1

- Members are not primary sleep researchers.
  - What does SRS provide?
  - Clear communication in newsletter

- Increase international members, including in SRS leadership.
- Focus on the younger generation to maintain SRS community.
  - Contact PIs to inform their trainees and encourage them to participate.
  - "Journal Club" in Sleep.
- Make people "need" the SRS.

GROUP 2

- Reviewer education
- Keep lobbyists, especially Dale.
- RFAs, Michael Twery, relationship to NCSDR
- Build and maximize patient advocacy.
- Diversify funding.

GROUP 3

- N/A

GROUP 4

- Who to contact at other societies
- Finding people without sleep mentors
- Getting mentors engaged
- Maintaining contact between meetings (webinars?)
- Late early-/mid-career support
- Expanding ASA mentor program with other nations
- Get more people in mentor/mentee program.
- Implementation of neurology physician training – pre-fellowship
- Psychiatrists?

GROUP 5

- Branding is still an issue.
  - Thirst for knowledge on sleep: how to meet this need
  - Corporate halo: sleep-related humanitarian effort
  - New membership category: sleep ambassador

STRATEGIC MAP UPDATE

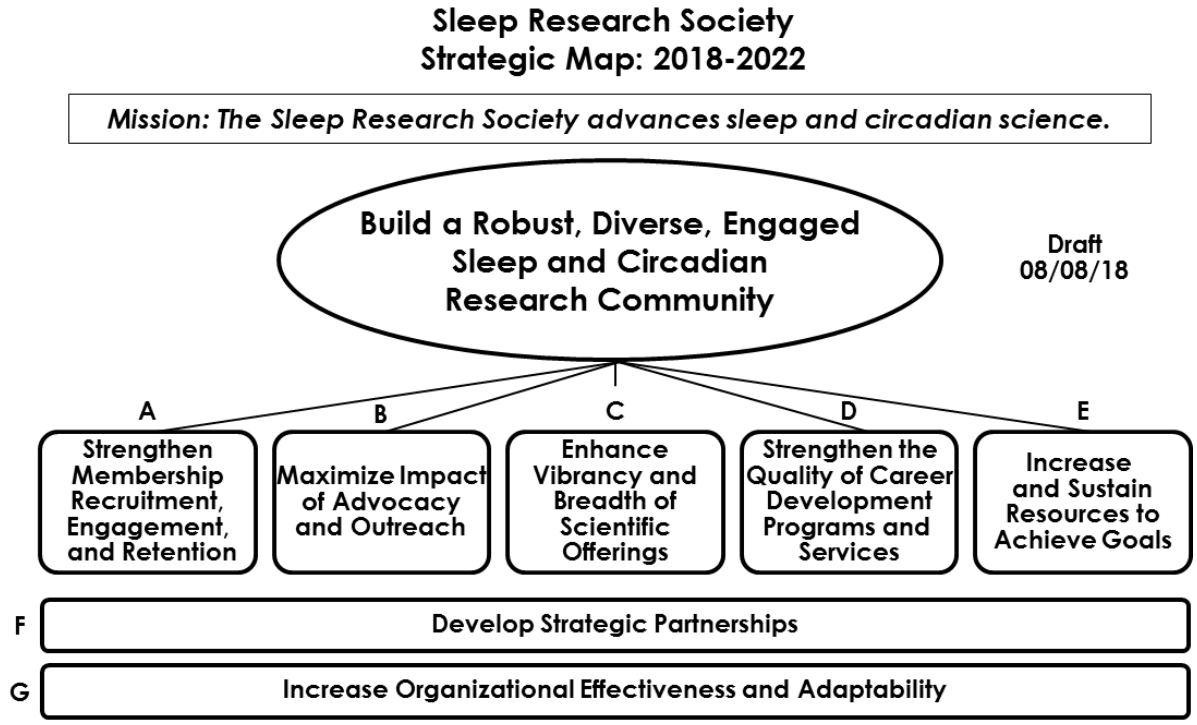
Using a one-page graphic representing a strategic map, Laurie Schulte explained the concepts of the strategic map: central challenge, strategic priorities and strategic objectives.

- The oval at the top of the strategic map is the central challenge.
  - It is the focal point for the strategy.
  - It focuses on what the organization needs to do in the next four years to advance its mission.
- The central challenge is supported by some number of strategic priorities. Strategic priorities are the few critical things an organization must do in order to meet its central challenge. The number of strategic priorities can vary, but it is never fewer than three or more than six.
- There are two tests of a strategic priority:

  - Is each priority necessary to meet the central challenge?
  - Are the strategic priorities taken together sufficient to meet the challenge?
- In strategic map logic, a cross-cutting strategic priority:
  - Is placed at the bottom of the strategic map to show that it is foundational to the strategy
  - Spans the map from left to right to demonstrate that efforts to achieve the cross-cutting priority will be embedded in the efforts to implement all of the other strategic priorities on the map
  - No plan to implement the other strategic priorities will be considered complete unless it includes emphasis on the cross-cutting priority.
- The boxes under each strategic priority are strategic objectives. Objectives spell out more specifically "what to do" in order to achieve the strategic priority.

Central Challenge and Strategic Priorities

Participants reviewed SRS's current strategic map and considered what changes, if any, needed to be made to the central challenge and strategic priorities. After discussion, the group agreed to the following version as "good enough" to begin work to update the bottom portion of the strategic map.



Strategic Mapping

Using the prior strategic map and the previous discussion as input, participants worked in small groups to identify strategic objectives that support each strategic priority. A summary of the small group reports follows.

Strategic Priority A: Strengthen Membership Recruitment, Engagement, and Retention

- Determine and develop benefits the SRS needs to provide to maximize membership value.
- Optimize multiple communication strategies and tools to current and prospective members.
- Implement novel strategies to attract and engage broad sleep and circadian research community.

Strategic Priority B: Maximize Impact of Advocacy and Outreach

- Pursue a highly effective lobbying presence with government agencies.
- Develop relationships with non-government organizations and industries.
- Engage in public outreach and education.
  - Communications Committee
  - Partner with Advocacy and Outreach.

Strategic Priority C: Enhance Vibrancy and Breadth of Scientific Offerings

- Optimize partnerships within the research community.
- Continue to build SRS meetings and forums.
- Proactively incorporate cutting edge and diverse research.
- Develop sleep and circadian education resources.

Strategic Priority D: Strengthen the Quality of Career Development Programs and Services

- Target training opportunities and mentoring to appropriate trainee with success metrics.
- Develop domestic and international training opportunities in academia and industry.
- Expand training programs to include early faculty positions.
- Develop neurology physician scientist program.

Strategic Priority E: Increase and Sustain Resources to Achieve Goals

- Aggregate information resources.
  - Databases/datasets
  - Code
  - Protocols
  - Cohorts/networks
  - Webinars
  - Career development resources
- Sustained fundraising for SRS Foundation
- Form new public (government) or private partnerships (to provide "branding," funding, training opportunities/internships).
- Educational products and outreach (workshops/specialists)
- Broaden membership and meeting attendee base (new member categories).

Strategic Map for the Sleep Research Society

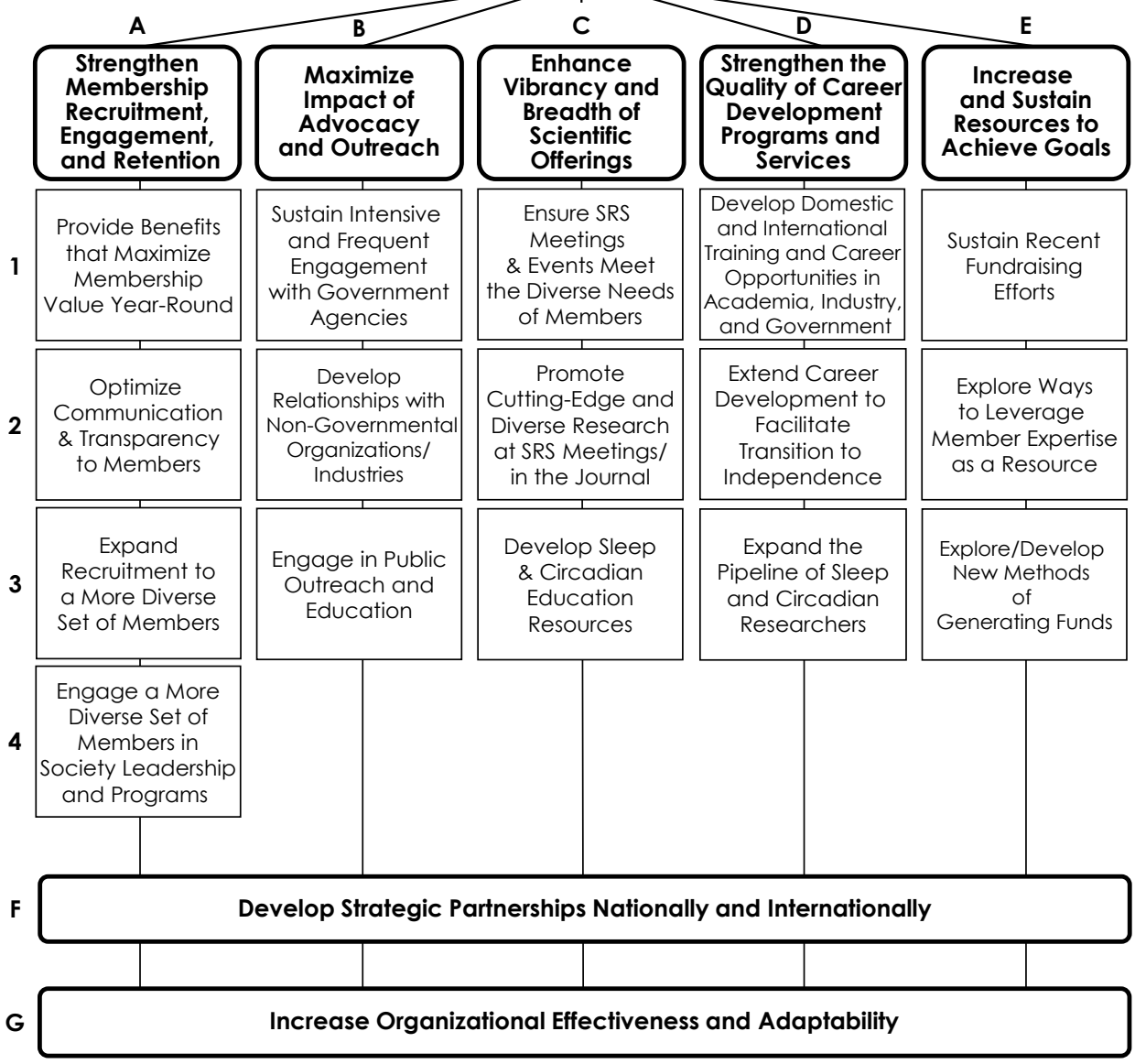
Based on the above input and extensive discussion that followed – as well as additional revision by the Board after this session – the Board developed the updated strategic map on the following page to guide SRS during the next four years.

Sleep Research Society
Strategic Map: 2018-2022

Mission: The Sleep Research Society advances sleep and circadian science.

Build a Robust, Diverse, Engaged Sleep and Circadian Research Community

Draft 08/10/18



Highlights from the discussion of the strategic map follow.

- In discussing the central challenge, "Build a robust, diverse, engaged sleep and circadian research community," the following points were made.
  - The prior central challenge was not meaningful for SRS.
    - It was internally focused.
    - "It never comes up."
  - SRS's challenge is to build a strong sleep and circadian research community.
    - This community needs to be more diverse, and more engaged.
    - SRS needs to be financially sustainable to support this.
  - "Diverse" is meant in all of its aspects – not just geography. SRS should consider embedding a link to its definition of diversity in the strategic map.
- Strategic Priority A, "Strengthen membership recruitment, engagement, and retention":
  - Will always be a strategic focus for a membership society
  - Elevates member recruitment and retention, in addition to engagement, as core to the priority
- Strategic Priority B, "Maximize impact of advocacy and outreach," remains unchanged from the prior strategic map.
- Strategic Priority C, "Enhance vibrancy and breadth of scientific offerings," reflects the addition of the word "breadth." As SRS expands the diversity of its membership, it will need to ensure its science is aligned.
- Strategic Priority D, "Strengthen the quality of career development programs and services," remains unchanged from the prior strategic map. It reflects the work SRS will do for the field, not simply for the Society.
- Strategic Priority E, "Increase and sustain resources to achieve goals":
  - Acknowledges that both resource acquisition and sustainability are essential for success
  - Includes financial resources as well as leveraging member expertise as a resource
- The group had extensive discussion about the Board's desire to expand the Society's international footprint. Cross-cutting Strategic Priority F, "Develop strategic partnerships nationally and internationally," reflects the Board's decision on how to reflect this in the strategic map.
  - The priority might include increasing the number of international members.
  - It might include expanding engagement with international sleep societies.
  - Its implementation should be clearly articulated.
  - As a cross-cutting priority, strategically partnering domestically and internationally should be a lens for all of the other work on the map.
- Cross-cutting Strategic Priority G, "Increase organizational effectiveness and adaptability," includes making whatever organizational modifications are required to align with the strategy (e.g., another relook at SRS committees, if appropriate).
- The group was purposeful in reducing the number of strategic objectives on the map – as well as articulating them in a more focused, self-explanatory way.

Implementation Priorities for the Next Year

After the strategic planning portion of the meeting, the Board agreed on the following as implementation priorities for SRS for the first year of its updated strategic map.

- Strategic Objective A-3: Expand recruitment to a more diverse set of members.
- Strategic Objective B-1: Sustain intensive and frequent engagement with government agencies.
- Strategic Objective B-3: engage in public outreach and education.
- Strategic Objective C-2: promote cutting-edge and diverse research at SRS meetings/in the Journal
- Strategic Objective E-1: Sustain recent fundraising efforts.
- Cross-cutting Strategic Priority F: Develop diverse partnerships nationally and internationally.

Next Steps

At the conclusion of the meeting, the group identified the following next steps.

- The Clarion Group will provide the following to John Noel for distribution to the SRS Board:
  - A final version of the strategic map
  - A "presentation version" of the strategic map
  - A comprehensive written summary of the strategic planning session
- Laurie Schulte will meet by phone with Andy Krystal, Sean Drummond, and John Noel to identify next steps for:
  - Communicating the updated strategic map to stakeholders, particularly SRS members
  - Moving to implementation of the strategy
  - Ensuring SRS has a robust "review and adjust" process in place for monitoring implementation of the strategy