



2005/06 Business Plan

SEARCH Canada
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1. Introduction

1.1. Introduction to SEARCH Canada

In 1996, the Alberta Heritage Foundation for Medical Research (AHFMR) launched the S.E.A.R.C.H. Program (Swift, Efficient Application of Research in Community Health) to help strengthen capacity in Alberta's health system for developing, disseminating and using information to meet the challenge of improving health outcomes. In 2003, after three cohorts of participants and proven impact on capacity, the Foundation engaged its health region, university and government partners in an extensive consultation and strategic planning process which resulted in the Five Year Plan of 2004 (see section 2.3). This plan provided the basis for a Memorandum of Understanding among AHFMR, all nine health regions in Alberta, Alberta Health and Wellness and the University of Calgary, expressing commitment to implementing the plan.

Following the signing of the MoU in the spring of 2004, AHFMR moved to implement the plan for 2005-2009, with the first year being a year of transition from an internal partnership program to a fully fledged, independent not-for-profit corporation, accountable to its members through an independent Board of Directors. During this year, the legal and financial foundations of the new organization were established through a Unanimous Members Agreement, Funding Agreements, Articles and Memorandum of Association and License and Transfer Agreement. These agreements were completed in the fiscal year of 2004-05, under the guidance of a Transitional Advisory Committee with representatives from the member groups. This Committee also established a Nominating Committee to seek nominations for and recommend members for the new organizations' Board of Directors.

The not-for-profit corporation was established in the summer of 2004, initially under the name SEARCH Alberta, and the first member's meeting of the corporation was held in November 2004, followed by the first Board meeting in December 2004. On April 1, 2005 the new corporation become operationally separate from AHFMR, funded through an AHFMR grant and members' commitments. At this time, the corporate name was changed to SEARCH Canada.

1.2. Business Plan

This business plan provides an overview of goals, strategies and targets for 2005/06, Year 2 of the SEARCH Five-Year Plan. It aligns with and builds on the vision and strategies outlined in the “Draft Five-Year Plan for the SEARCH Program 2004-2009”, commonly referred to as the SEARCH Five-Year Strategic Plan (available from SEARCH Canada: 780-429-6891).

This business plan provides a statement of the SEARCH organization’s responsibilities (core functions) and the results to be achieved (goals)—and serves as an accountability management document between the Board of Directors and Executive Management. It indicates how responsibilities will be carried out to achieve results (strategies), and how progress will be measured (outputs and impact).

Once approved, the SEARCH business plan is an agreement between the Members (through the Board of Directors) and Executive Management (as represented by the Chief Executive Officer) on what is to be accomplished in the next fiscal year.

In summary, the 2005/06 business plan defines SEARCH management’s responsibilities for:

- Core functions and key strategies
- Strategic priorities
- Goals, outputs and performance measurement

The business plan is also a tool that communicates direction, goals and strategies to staff, client organizations and other stakeholders. It allocates resources to deliver services, implement strategies and achieve goals and also identifies human resource plans for business strategies predicted to have significant impact on human resources.

2. Vision, Mission, Beliefs and Principles

Vision

Creating Knowledge Cultures

Mission

Our mission is to help health organizations make the best decisions through development of people, relationships and information.

Beliefs and Principles

Because we believe that:

- In health system workplaces, knowledge is generated, selected and used by all
- Quality research requires the engagement of the whole health system
- Organizations know best how to build their own capacity
- Networks of diverse people create powerful learning and knowledge exchange

SEARCH is committed to:

- Enhancing the growth of practising professionals and applied researchers
- Collaboration with academic, service and government partners across the health system
- Working with both organizations and individuals
- Responding to the environments of individuals, organizations and the system
- Excellence in program design and delivery through innovation
- Leveraging SEARCH assets for future growth and benefit
- Managing and developing resources for sustainability and growth

Values

These values guide our actions:

- Innovation and excellence
- Partnership, engagement, cooperation and inclusiveness
- Flexibility, relevance and responsiveness
- Learning and building on assets
- Accountability and sustainability.

3. Five-Year Strategic Objectives (2004-09)

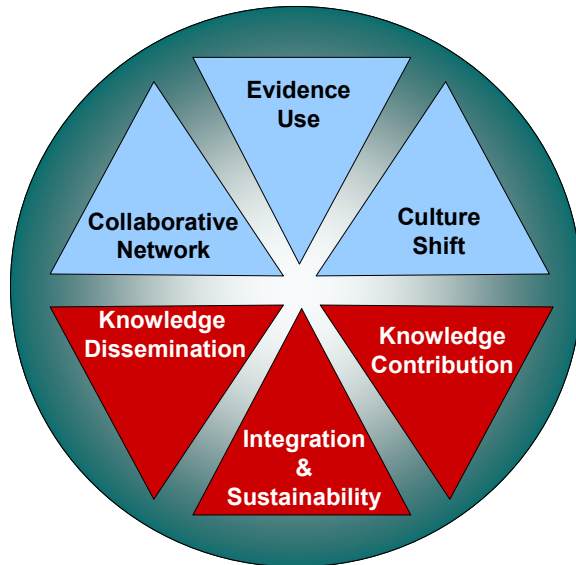


Figure 1: Five-Year Strategic Objectives

To achieve our Vision and Mission, SEARCH will pursue five-year strategic objectives that are an extension of the founding goals of SEARCH articulated in 1996. These objectives focus on outcomes to be achieved in the health sector, but these may be relevant beyond health. The strategic planning of 2003-04 re-confirmed existing objectives #1, #2, #3 and #4, and added #5 and #6 to further meet the members' needs.

1. A culture that values research and its use

To create a culture in which policy-responsive research is both valued and supported.

2. People using research in decisions

To have health professionals using current, relevant and appropriate information to assist in identifying priority health issues and making decisions on these issues based on research results.

3. A network of expertise and support:

To develop a collaborative network of expertise across Alberta to initiate and carry out health research on a local, regional or provincial basis.

4. Contributing new knowledge:

To conduct research and evaluation that contributes to world-wide knowledge about capacity for applied research.

5. Dissemination of knowledge:

To increase the dissemination of research-based knowledge to decision-makers.

6. Integration and sustainability:

To integrate capacity for applied research and evidence-based practice into the core activities of all institutions in the health sector, to ensure sustainability

In addition to long-term strategic objectives for the health sector, the Five Year Plan identifies specific measures of success for the intended role of SEARCH in the health sector. Within five years, success will be judged on demonstrating the following:

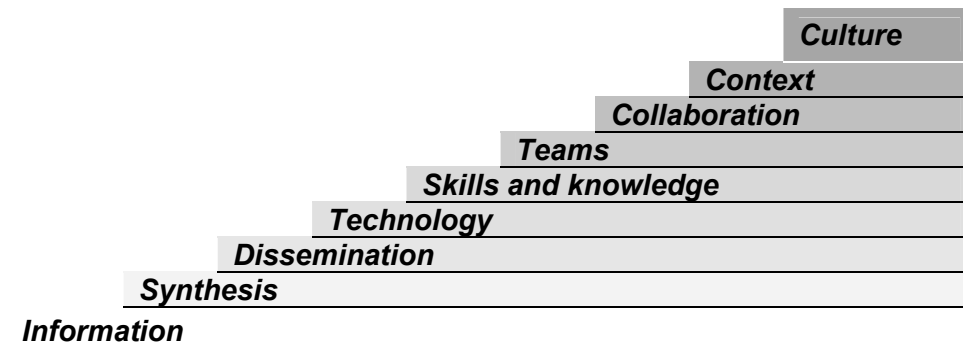
- Sustained success of the 'Classic' SEARCH Program
- Activation of the province-wide network of expertise to respond to system needs
- Response through new programs and services to changing needs and opportunities in Alberta
- Further integration of the SEARCH capacities in health system organizations
- Shared leadership and commitment among partners
- Strengthened Alberta leadership in the field of capacity-building for health research and its application

The Unique Offering

SEARCH's unique contribution is growing a culture of trust in which a culture of knowledge can thrive. Above and beyond skills and information, evidence-based practice depends on the attitudes and values people have about themselves and their daily interactions. Using research is as much a matter of relationships as of information. It is dependent on a culture of openness, exchange, respect and confidence.

SEARCH provides a unique resource to the health sector by addressing all the building blocks of a system that can effectively and efficiently use the best available evidence to inform decisions for better health outcomes.

Figure 2: Building blocks of a knowledge culture: the SEARCH offering



4. Core Functions and Key Strategies

The core functions of SEARCH Canada speak to the essential reasons why this not-for-profit corporation exists, and the critical areas of business that must be addressed to be successful. The core functions map to the long term objectives and provide the framework for identifying and managing strategies.

In total, there are thirteen strategies SEARCH uses to achieve its mission. During 2005-06 some of these are well-established and will be continued, some require enhancement or expansion, some are developmental and some will be initiated.

Table 1: Summary of Core Functions and Related Strategies

Core Functions	Strategies
1) Program Delivery	a) SEARCH Classic Program b) SEARCH Custom c) Consulting Services
2) Knowledge Services	a) SEARCH Desktop Services b) Research and Evaluation c) Faculty Development d) SEARCH Curriculum Products
3) Partnerships and Alliances	a) Promotions and Awareness b) Member Liaison c) Business Development
4) Organizational Development	a) Administration and Corporate Services b) Governance and Planning c) Corporate Knowledge Management

Success depends on building upon the core asset of the SEARCH Classic Program, which has tested and delivered all elements of future programs and services.



1) Program Delivery

“To design and deliver high quality, capacity building programs for organizational development, collaboration and action learning.”

SEARCH has earned its reputation through designing, developing and delivering high quality innovative programs that build capacity in individuals and organizations across the diverse milieus of the health sector. Without providing world-class programs, the advantages of SEARCH will be lost.

Strategies

- a) **SEARCH Classic:** the core program offering is a two-year cycle of cohort-based learning combining:
 - Learning Opportunities - face to face retreats
 - Research Support - for local and provincial research projects
 - Desktop Services – to support a virtual learning community
- b) **SEARCH Custom:** elements of SEARCH Classic and other services, offered responsively to individuals and organizations (previously offered through the Alberta Consultative Health Research Network (1998-2004)):
 - Research Support - advice, mentoring and facilitation of research projects
 - Collaborative Network Support – communication and coordination functions for the SEARCH Network of participants and faculty, and a broader network in regions.
 - Custom Learning Opportunities – active learning events provided to groups and organizations on request.
- c) **Consulting Services:** responding to requests to provide consultation to organizations on developing as an “Evidence-Based Organization”; also consulting to other agencies on developing SEARCH-like programs and strategies.

2) Knowledge Services

“To develop and provide SEARCH knowledge services for member and system benefit.”

SEARCH has established know-how, methods, data, models, systems and approaches that constitute a major asset for the future. The Five Year Plan calls for extensions, replications, new services and growth. These depend on establishing systems and processes that capture, consolidate and create new offerings from the program design, the curriculum, the research and the faculty model of SEARCH. In particular, extended access to the “SEARCH Desktop” services, provided in alliance with the Centre for Health Evidence to SEARCH Classic participants, is a key demand from members and others.

Strategies

- a) **SEARCH Desktop Services:** knowledge access and management services provided through an integrating web-based interface that organizes, delivers and manages simple, custom ‘desktops’ to groups of people, including participants, faculty and others; provided in conjunction with the Centre for Health Evidence, University of Alberta.
- b) **Research and Evaluation:** a forum for research and evaluation through research on the program itself, research done by participants and faculty, and research commissioned for SEARCH; a ‘living lab’ for knowledge transfer research and a responsive research network; dissemination of the results.
- c) **Faculty Development:** a core asset of SEARCH is the unique, multi-disciplinary faculty team; the model for faculty recruitment, development and retention will be captured and strengthened.
- d) **SEARCH Curriculum Products:** a unique, inter-professional curriculum (used in SEARCH Classic) for developing evidence-based practice and management through collaborative teams; the base for future extensions, including university programs and customised programs.

3) *Partnerships and Alliances*

“To develop and strengthen partnerships and alliances that increase awareness, adoption and extension of SEARCH vision and programs among health systems and stakeholder communities.”

SEARCH has been built through an explicit strategy of advocacy for research and a strong network of collaborative relationships. Greater impact is prefaced on increased strength of these core relationships, particularly with member organizations in Alberta. It also requires collaboration with new partners within and outside Alberta as the basis of revenue-generating programs and services.

Strategies

- a) **Promotion and Awareness:** communications, events, and relationship management to support and strengthen the SEARCH community, internal and external stakeholder buy-in and understanding.
- b) **Member relations:** a specific strategy to sustain and strengthen the support of SEARCH Canada members (Alberta RHAs and universities), which will include elements of promotions as well as executive and Board activities and planning.
- c) **Business Development:** initiating, pursuing and establishing additional projects and services based on revenue, through development of partnerships and collaborations, supported by promotions.

4) Organization Development

“Maintain and strengthen central organizational functions to sustain the community and corporate entity.”

SEARCH outgrew its organizational structures and processes by 2004. The not-for-profit corporation operational in 2005 provides a new structure for streamlined management and reporting processes, clearer accountabilities, better support of all staff and faculty, and improved communications. As a new organization, the corporate and organizational infrastructure and functions will require continued attention.

Strategies

- a) **Administration and Corporate Services:** the provision of executive, administrative, financial, legal and human resource supports at the organizational level.
- b) **Governance and Planning:** the provision of leadership, oversight and effective process in establishing and monitoring corporate goals on an annual and long term basis.
- c) **Corporate Knowledge Management:** the integration of all SEARCH organization modules and people into a single information management system that ensures the ongoing collection and sharing of knowledge emerging in the organization.

5. Positioning for Success

Year One Accomplishments

During Year 1, SEARCH Canada has attended to the organizational and strategic foundations to be able to respond to growing opportunities and member needs. As well as continued delivery of programs and services, the following key accomplishments provide a foundation for future success:

- Corporate entity established with all legal foundations and renewed identity
- Governance structure, process and model established with new Board and critical policies
- Organizational functions, strategies and structure redefined and business planning completed.
- Pre-existing ACHRN activities and functions integrated into SEARCH
- Key alliances and relationships solidified:
 - Strategic alliance with the Centre for Health Evidence (UA) established (in final discussion)
 - New framework for Faculty engagement established with participating academic institutions
 - Contractual relationship with the Centre for Health and Policy Studies (UC) established

Critical Success Factors

In order to continue to deliver quality programs and services, while expanding to address member needs and meet new opportunities, the following factors will be critical. These factors identify, particularly, the need for continued strengthening of internal capacity in order to deliver external benefit.

- Launch the new corporate entity, including enhanced branding for awareness of programs and services
- Ensure effective Faculty recruitment, development and retention
- Strengthen internal management capacity and functions
- Implement effective and sustained strategic communications and information dissemination of all kinds
- Continue and strengthen collaboration with implementation partners at Universities of Alberta and Calgary
- Strengthen and extend Member buy-in, including university and government relations
- Re-position for cost recovery and revenue generation for new business
Identify and deliver extended member benefits within current budget
- Focus on priority opportunities only

6. 2005-06 Goals and Outputs

Annual Goals and Priorities

Program Priorities

Following analysis of new opportunities by urgency, impact and capacity, the identified highest priority opportunities for expanded or new growth in Year 2 are, in order:

- 1) Strengthen and extend SEARCH Custom
 - Focus on region by region planning and strategies
 - Establish capacity for extension
- 2) Enhance and extend Knowledge Management Services
 - Provide extended access to members
- 3) Pursue partnership and alliance opportunities in Western Canada
 - Establish relationship with MSHRF
- 4) Clarify and establish Consulting Services
 - Develop offering of 'Evidence-Based Organizational Consulting'
 - Establish revenue-generating consulting contracts

Goals

Based on the prioritized opportunities, consideration of risks and critical success factors, SEARCH has identified **4 primary goals and 2 supporting goals** for the upcoming fiscal year.

Table 2: 2005-06 Goals

<p>Goal 1 Program Delivery</p>	<p>SEARCH will <u>continue to improve</u> the design and delivery of capacity-building programs that increase the number of people in organizations that have the skill-sets, information, networks and culture required to use research in decision making by <i>providing learning opportunities, network support, research support and consultation.</i></p>
<p>Goal 1.1 Faculty Development</p>	<p>SEARCH will <u>strengthen</u> engagement and retention of a diverse faculty team to ensure collaboration and mutual exchange in high quality, multi-disciplinary programs by <i>recruiting, developing, supporting and recognizing individuals from faculties and institutions across the academic sector.</i></p>
<p>Goal 2 Knowledge Services</p>	<p>SEARCH will <u>establish</u> the ability to leverage SEARCH knowledge assets for wider distribution and revenue generation by <i>developing and establishing systems and strategies</i> that create identified products out of SEARCH program elements such as curriculum, program methods, and knowledge management.</p>
<p>Goal 3 Partnerships and Alliances</p>	<p>SEARCH will <u>formalize</u> partnerships and alliances to extend the SEARCH program and strategies beyond current clients and partners by <i>establishing entrepreneurial relationships within current opportunities.</i></p>
<p>Goal 3.1 Promotions and Awareness</p>	<p>SEARCH will <u>increase</u> understanding of and commitment to the SEARCH vision, mission, concepts, services and products among members, stakeholders and targeted client groups through implementing <i>an effective and coordinated promotions and awareness strategy.</i></p>
<p>Goal 4 Organizational Development</p>	<p>SEARCH will <u>develop and refine</u> the organizational infrastructure required to efficiently meet current and future business needs by <i>implementing the human resource and organizational development plan.</i></p>

1. Increase the number of people in organizations using research in decisions

SEARCH will continue to improve the design and delivery of capacity-building programs that increase the number of people in organizations that have the skill-sets, information, networks and culture required to use research in decision making by providing learning opportunities, network support, research support and consultation.

Strategies

- Sustain and improve the delivery of SEARCH Classic Program
- Increase access to and coordination of SEARCH Custom services in Alberta's health regions, with a particular focus on northern regions.
- Stimulate, sustain and capitalize on the SEARCH Network of participants. Establish plan and outreach for consulting services.

1.1. Strengthen a diverse faculty team for collaboration and quality programs

SEARCH will strengthen engagement and retention of a diverse faculty team to ensure collaboration and mutual exchange in high quality, multi-disciplinary programs by recruiting, developing, supporting and recognizing individuals from faculties and institutions across the academic sector.

- Describe and implement an integrated and continuous process of faculty recruitment, orientation, development and support.
- Implement the new Policy Framework for Faculty Engagement with participating institutions.
- Further develop and evaluate new faculty roles

2. Deliver additional products and services from SEARCH knowledge services

SEARCH will establish the ability to leverage SEARCH knowledge assets for wider distribution and revenue generation by developing and establishing systems and strategies that create identified products out of SEARCH program elements such as curriculum, program methods, and knowledge management.

- Become a leader in decision support within Alberta by extending access to SEARCH Desktop
- Develop and implement a strategy and process for courseware development and re-use
- Renew and implement a comprehensive five-year Research, Evaluation and Design Blueprint

3. Extend SEARCH to other clients and jurisdictions

SEARCH will formalize partnerships and alliances to extend the SEARCH program and strategies beyond current clients and partners by establishing entrepreneurial relationships within current opportunities.

- Strengthen alliances with key implementation partners
- Pursue priority partnerships and alliance opportunities in Western Canada
- Collaborate with CHSRF and EXTRA
- Pursue funding for an international project

3.1 Increase commitment to the vision through awareness

SEARCH will increase understanding of and commitment to the SEARCH vision, mission, concepts, services and products among members, stakeholders and targeted client groups through implementing an effective and coordinated promotions and awareness strategy.

- Launch SEARCH Canada and establish expanded brand identity
- Strengthen investor/member relations
- Promote programs and services and disseminate learnings
- Strengthen and support networks and community through communication vehicles

4. Meet business needs through organization infrastructure

SEARCH will develop and refine the organizational infrastructure required to efficiently meet current and future business needs by implementing the human resource and organizational development plan.

- Implement and evolve the governance model and planning process
- Establish sustainable, efficient and effective executive management and corporate services
- Establish costing and pricing mechanism for programs, products and services
- Establish the requirements for integrated information and knowledge system to support SEARCH management and operations

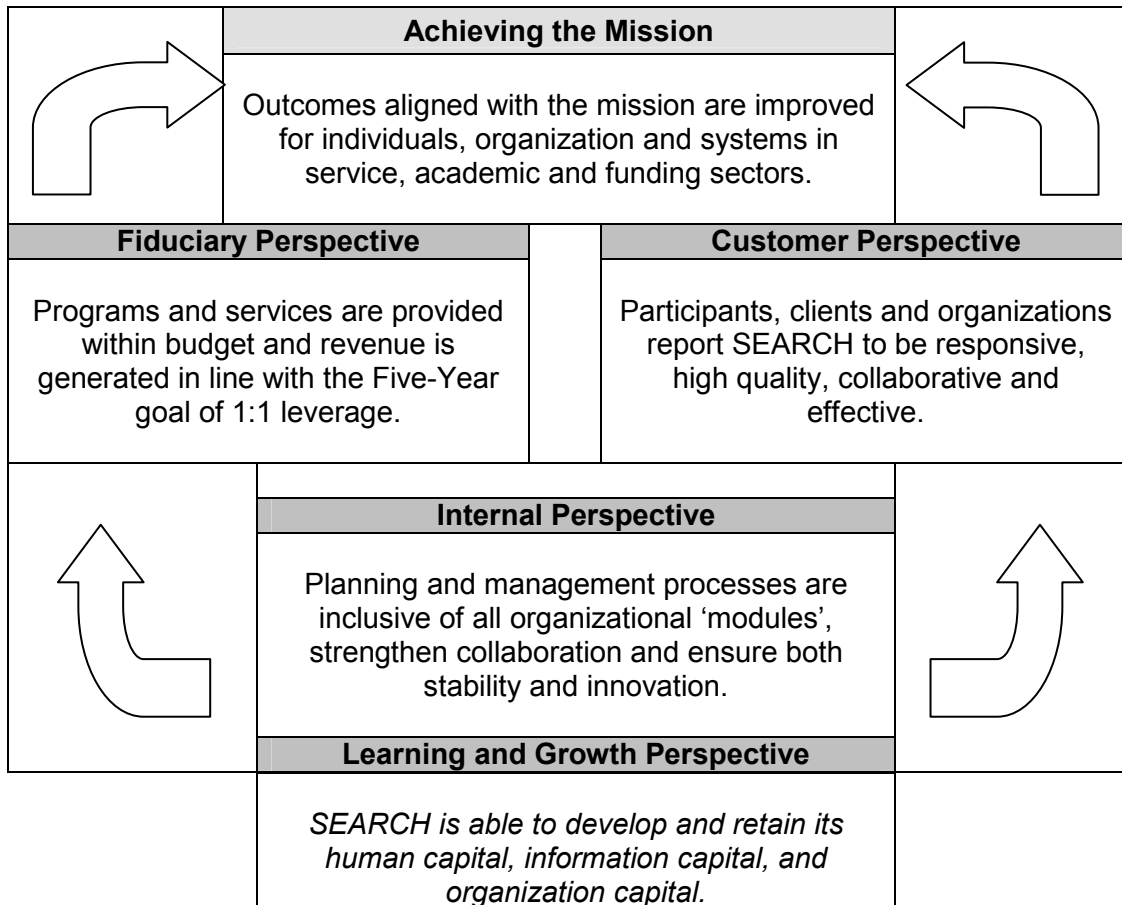
7. Organizational Performance

SEARCH has a strong history of performance measurement at many levels and from many perspectives. Overall organizational performance needs to be assessed by building on existing impact assessment and identifying performance measures that capture internal and external markers of success.

This section outlines a proposed approach to developing a 'balanced scorecard' approach to performance measurement, and provides a more detailed summary of the evaluation framework already in use to assess short and long term impact (Achieving the Mission) and to gain input from participating individuals and organizations (Client Perspective). To date, the Fiduciary and Internal Perspectives have been assessed by AHFMR.

A Balanced Scorecard for SEARCH Canada

A balanced score card would consider overall organizational performance from five specific perspectives. The following provides initial draft statements to capture overall success. In 2005-06 SEARCH Canada will further develop the measures and indicators within each performance area, and implement a comprehensive research and evaluation strategy (see Goal 2) that captures these outcomes.



The SEARCH Impact Assessment Framework

Over its eight year history, SEARCH has developed and implemented a number of evaluation frameworks. The following framework has proven effective for identifying the range of expected impacts of SEARCH and prioritizing research and evaluation initiatives, each of which has focussed on developing specific logic models and indicators for an impact area.

Level of Change	Locus of Change	Service Delivery e.g. RHAs, MDs	Academic e.g. universities, colleges	Funding e.g. AHFMR
Individual				
Individual in organization				
Organization				
System (organizational groups)				
Trans-sectoral system				
SEARCH governance and management				

In order to successfully implement a performance management system, the number and sophistication level of performance measures must be balanced according to the resources and abilities of the organization to effectively gather and report evaluation data. A renewed Five-Year Research, Evaluation and Design Blueprint will establish the priorities for overall performance measurement through the next five years, based on importance and feasibility.

8. Human Resources Strategy

Goals

The primary goals of this year's HR plan are to:

- (1) Ensure strong management with the capacity to manage the organization for growth.
- (2) Strengthen operational teams in areas of high priority
- (3) Maintain the benefits of a 'networked' or 'modular' structure, while diminishing the costs, such as multiple accountabilities.

Human Resource Strategy

Therefore the HR strategy will:

- Establish, as far as possible, focussed, full-time commitment of personnel
- Establish clear accountabilities within SEARCH Canada, regardless of mode of engagement, location or other affiliations.
- Use employment, secondment and contracting in balance to meet the needs of current staff and implementation partners
- Recruit and develop personnel in Executive Management (see table below) and Knowledge Services
- Recruit and develop Faculty personnel (see Goal 1.1), and establish clear management responsibilities for Lead Faculty.

Figure 3: Operational Chart

