

HEALTH RESEARCH ALLIANCE –2021 STRATEGIC PLAN

UPDATED FEBRUARY 2023

MISSION

The Health Research Alliance (HRA), a collaborative member organization of nonprofit research funders, is committed to maximizing the impact of biomedical research to improve human health.

CORE VALUES

- Impact: We enable individual organizations and the research community collectively to enhance the effectiveness of biomedical research.
- Collaborate: We communicate; share information, experiences, and best practices; and work together to achieve our shared goals.
- Innovate: We identify, aggregate, and share valuable resources or foster innovative approaches, when needed, to address challenges in biomedical research.

ORGANIZATION

HRA is a membership organization composed of nonprofit funders of biomedical research and training. HRA members represent a variety of types of nonprofit funders of biomedical research, including voluntary health agencies, private foundations, public charities, and societies. Members strive to identify and adopt effective practices in funding biomedical research and speed the translation of biomedical science into applications that improve health. HRA was incorporated in November 2005 and is tax-exempt under section 501(c)(3) of the Internal Revenue Code as a 509(a)(2) public charity.

STRATEGIC PLANNING PROCESS

To generate recommendations for the next three years, HRA assembled a Strategic Planning Committee. In March 2020, the Board of Directors designated a committee chair and solicited nominations for committee membership from the entire HRA membership. ([Appendix 1](#)). After reviewing the nominations, the board established the committee in April 2020. The committee was composed of 12 members, including several from the board and two staff ([Appendix 2](#)). After issuing an RFP ([Appendix 3](#)) and interviewing two firms, the committee hired [verynice](#) to facilitate the strategic planning process (see [Appendix 4](#) for *verynice's proposal*). With the committee's guidance, *verynice* crafted survey questions and identified topics for discussion. *Verynice* obtained feedback through video interviews and online surveys of both HRA member and nonmember organizations. In addition, *verynice* hosted a half-day interactive workshop for 40 people (including board members, working group co-chairs, other engaged HRA members, and staff). At the workshop, participants highlighted the issues they believe HRA should devote resources to in the next three years. Finally, *verynice* provided a thorough analysis of the data collected from the surveys, interviews, and workshop, including recommendations based on their analysis of the nonprofit and other similar sectors (see [Appendix 5](#) for the full report).

The committee used *verynice's* report to identify goals valued by the membership, and then defined strategies and activities to achieve those goals. Much of what was identified were goals, strategies, and activities that HRA had already implemented and were highly valued by the membership. The committee noted areas where current activities could be enhanced, and new activities should be considered, and noted one program that should be discontinued (HRA Reporter). The updated version does not include these distinctions. In addition, what were strategies in version one, have been reworded to become outcomes, and activities are now strategies to achieve those outcomes. This version does not include estimated impact of various strategies/activities, resource needs beyond what was allocated, or estimated financial costs for current activities, which were in the initial version.

CONTEXT

The 2021 Strategic Plan set out recommendations for HRA for the next three years and built on the significant accomplishments that followed the 2016 Strategic Plan. Since the 2016 plan, HRA has:

- Grown its membership from 75 to approximately 110 organizations that support biomedical research.
- Increased the number of, participation in, and productivity of the learning communities. In 2016 there were five “interest” groups that met sporadically and were inconsistent in setting goals and producing resources. Now, there are 10 “learning communities” that are charged with defining a mission and a timeline to produce specified resources to share with the membership, though community accountability and productivity is still inconsistent.
- Increased the number of listservs to six (general, fundraising professionals, communications professionals, CEO-focused, job postings, and RFA/RFP postings).
- Launched two affinity groups (HRA’s Book Club and the Communications Affinity Group).
- Pivoted from in-person biannual member meetings, to virtual meetings in 2020, 2021, and spring 2022, with high virtual participation rates and value for attendees (as measured by post-meeting evaluations). We began hosting hybrid meetings in fall 2022, also with high virtual and in-person attendance and perceived value.
- Secured several grants from HRA members for new programming (including the Collaboration Workshop, Cultural Competency Training, the Reimagine Biomedical Research essay contest, the Inclusive Grantmaking Initiative, the Explore the Value of Open Program, and infrastructure support (e.g., support for HRA Analyzer).

Additionally, the verynice report surfaced many areas where HRA provided exceptional value. For instance:

- 88% of members said they read HRA newsletters and use HRA resources posted to the website.
- 73% of members cited networking as a reason for being engaged with HRA.
- Many members commented that HRA adds significant value by providing opportunities for networking and professional development.
- Nearly 90% of members said fostering open communication and collaboration is important, with two-thirds noting that HRA does a good job currently and that this should continue to be a priority.
- 93% of members cited “learning from colleagues via listserv and other venues” as a reason they engage with HRA.

PLAN PURPOSE

The 2021 Strategic Plan was developed with a predominant objective — to enhance HRA’s value to HRA member organizations. The four goals detailed in this document, the desired outcomes, and the strategies to achieve those goals, are designed to increase HRA members’ ability (directly or indirectly) to enhance the impact of their investment in research, and by doing so achieve HRA’s mission. This plan is intended to chart a course for HRA’s future and provide guidance to HRA staff and leadership for allocating resources and measuring organizational effectiveness.

The order of the goals has been reversed in the updated version, though the target audiences and scope still differ across the goals.

Goal 1: Improve the Scientific Research Process

Goal 2: Drive Institutional Learning to Increase Member Organizations’ Effectiveness

Goal 3: Foster HRA Community

Goal 4: Empower HRA Through a Solid HRA Base

While this document does not include an implementation plan, it does suggest specific strategies to achieve outcomes and realize goals. Upon adoption of the 2021 Strategic Plan by the board, HRA staff developed a plan for implementing the suggested activities — driven by resources and priorities set by the committee and board — while maintaining flexibility to capitalize on new opportunities or pivot due to changing circumstances. Many of HRA's current strategies (e.g., learning communities, listservs, member meetings, and the website) facilitate several desired outcomes, highlighting their value to achieving HRA's mission.

The initial success of this plan will be measured by short-term outputs — specifically the degree to which the suggested strategies have been implemented or enhanced, and judged valuable by the membership. Metrics for evaluating longer term impact will be developed as the plan matures. Much of the value will need to be evaluated using web analytics, data on attendance, and surveys of the membership.

STRATEGIC PLAN OUTLINE

Goal 1: Improve the Scientific Research Process

Outcome 1.1

The effectiveness of HRA member organizations' own efforts to increase diversity, equity, and inclusion (DEI) within their staff, boards, review panels, portfolios, the scientific workforce, and the health care system is enhanced.

Outcome 1.2

The ability of HRA member organizations to develop and implement open and collaborative/team science policies, and foster their researchers' open science practices that advance scientific discovery is enhanced.

Outcome 1.3

The capacity of HRA member organizations to effectively communicate science and scientific impact to targeted audiences is increased.

Goal 2: Drive Institutional Learning to Increase Member Organizations' Effectiveness

Outcome 2.1

Enhanced listserv capacity serves the needs of members with diverse roles for information regarding specific issues, and listserv conversations are used to identify and prioritize new learning opportunities (e.g., webinars, learning community priorities, and member meeting sessions).

Outcome 2.2

A variety of HRA member meetings (including webinars) are developed and organized so that participants with diverse organizational roles are engaged — fostering education, information sharing and catalyzing group activities.

Outcome 2.3

Structures, policies, and procedures are developed that strengthen use of learning communities, and other initiatives or programs to meet member needs.

Outcome 2.4

The value of HRA's website to HRA member organizations is enhanced.

Goal 3: Foster HRA Community

Outcome 3.1

There is enhanced learning, collaboration, and networking at a variety of HRA convenings including semiannual, regional, or targeted member meetings.

Outcome 3.2

New relationships and collaborations are built due to members connecting and engaging based on shared characteristics or interests.

Outcome 3.3

Engagement in HRA activities increases the capacity of individuals in member organizations to be more effective in their careers.

Goal 4: Empower HRA Through a Solid HRA Base

Outcome 4.1

An expanded breadth and depth of perspectives represented by HRA member organizations.

Outcome 4.2

Shared services that members use and find valuable are provided to HRA members.

Outcome 4.3

HRA's capacity to develop additional programs of value has been enhanced by expanding and diversifying both staff and financial resources (including and beyond membership dues.)

Outcome 4.4

The voices of HRA members' individual and collective voices are amplified, multiplying their impact on areas of importance to the biomedical research community.

1.5 Outcome

HRA members have access to resources to analyze grant funding data for a wide variety of purposes (landscape and gap analyses, co-funding, identifying collaborators, visualizing trends, etc.)

Conclusion

STRATEGIC PLAN DETAILS

Goal 1: Improve the Scientific Research Process

Goal 1 will be achieved by supporting HRA member organizations' efforts to make research open, inclusive, and accessible; more fully leveraging diverse ideas and experiences; and increasing the public's respect for science.

Rationale

Diversity allows organizations to be more productive, creative, and innovative. And a diverse health care workforce improves patient care outcomes. Open science not only increases the rigor of scientific research, but also enables a diversity of opinions and experiences to be shared across the ecosystem. Additionally, open science can close knowledge gaps and level the playing field for researchers around the world, leading to more inclusive and equitable science. The ability to communicate the value of science is key to increasing impact. Thus, increasing the diversity of the workforce, fostering open science, and more effectively communicating the impact of science to a variety of stakeholders can be effective in accelerating the pace of discovery and fostering innovation.

1.1 Outcome

The effectiveness of HRA member organizations' own efforts to increase diversity, equity, and inclusion (DEI) within their staff, boards, review panels, portfolios, the scientific workforce, and the health care system is enhanced.

1.1 Strategies

1. Increase engagement and activities of the DEI learning community and related programs.
2. Launch formal umbrella program across communities and other HRA activities that will create resources to help HRA members develop and implement policies and procedures to result in more inclusive grantmaking.
3. Identify and cultivate partners and collaborators across the ecosystem to help achieve goals.
4. Highlight HRA member policies and practices that have been effective in reducing bias and inequity among staff and grant recipients.

1.2 Outcome

The ability of HRA member organizations to develop and implement open and collaborative/team science policies, and foster their researchers' open science practices that advance scientific discovery is enhanced.

1.2 Strategies

1. Increase engagement with HRA's Open Science and Data Sharing learning community.
2. Launch formal program and create resources to help HRA members develop and implement policies that encourage open, team, and collaborative science.
3. Create a rubric for open/team/collaborative science practices and policies and map HRA members to that rubric to (a) help organizations progress and (b) serve as a directory of those who can serve as advisors to other members.
4. Increase the use of HRA Open by HRA member organizations.
5. Identify and cultivate partners and collaborators across the ecosystem to help achieve goals.

Outcome 1.3

The capacity of HRA member organizations to effectively communicate science and scientific impact to targeted audiences is increased.

1.3 Strategies

1. Deepen engagement with HRA's Program Evaluation learning community.
2. Explore the communications needs of the HRA membership that can be filled by the communications learning community.
3. Explore other strategies/existing resources to increase HRA member organizations' capacity to communicate scientific impact to their stakeholders.

Goal 2: Drive Institutional Learning to Increase Member Organizations' Effectiveness

Goal 2 will be achieved by increasing the acquisition and dissemination of information, including resources, best practices, strategies, and metrics.

Rationale

HRA can increase member organizations' effectiveness by providing leadership, knowledge, tools, and opportunities to promote innovative and effective grantmaking. The strategies below enable collecting, developing, and disseminating collective wisdom around issues that are key to accelerating research discovery and its translation.

Outcome 2.1

Enhanced listserv capacity serves the needs of members with diverse roles for information regarding specific issues, and listserv conversations are used to identify and prioritize new learning opportunities (e.g., webinars, learning community priorities, and member meeting sessions).

2.1 Strategies

1. Provide infrastructure to enable members to easily find responses to previous listserv posts.
2. Those who post a question (or staff) compile summaries of listserv responses when appropriate, and summaries are posted to the HRA website, and publicized to the membership.
3. Encourage posting of broader questions to the listserv to foster use of the listserv by HRA members staff with a wider variety of professional roles and perspectives.

Outcome 2.2

A variety of HRA member meetings (including webinars) are developed and organized so that participants with diverse organizational roles are engaged - fostering education, information sharing and catalyzing group activities.

2.2 Strategies

1. Develop agendas for HRA member meetings that incorporate perspectives from a variety of individuals and sectors — including both HRA member speakers and outside experts.
2. Increase the diversity of staff roles within member organizations that attend member meetings by offering sessions that appeal to different audiences.
3. Develop aims for member meetings with stated objectives and actions.

4. Explore strategies and platforms to increase the value of virtual and hybrid meetings, especially engagement by and informal networking for remote participants.
5. Capture engagement in webinars and meetings, including organizational affiliation and professional roles to proactively increase engagement and diversity of participants.

Outcome 2.3

Structures, policies, and procedures are developed that strengthen the use of learning communities, and other initiatives or programs to meet member needs.

2.3 Strategies

1. Revise guidelines for learning communities including developing annual goals and setting consistent meeting schedules.
2. Ensure that learning communities are making progress toward their goals by identifying and disseminating valuable resources to the membership.
3. Create metrics for learning communities that include assessments by learning community members and HRA general membership, and guidelines for when communities should be created or disbanded.
4. More publicly recognize learning community cochairs for their contributions to advancing HRA's mission including via annual presentations to the board of directors.
5. Explore new platforms that can facilitate focused discussions with individuals interested in learning community discussions.

Outcome 2.4

The value of HRA's website to HRA member organizations is enhanced.

2.4 Strategies

1. Expand and enhance HRA's website functionality as a central repository of curated resources (e.g., increase discoverability and add, update, and delete resources more frequently).
2. Include instructions in the guidelines to the communities to identify, create, and post resources to the website.
3. Publicize all events and resources with links to the posting on the website via newsletters and the annual impact report.
4. Create and post a frequently updated "Grantmaking Handbook" resource for HRA members and the community (including "how to's" for biomedical grantmaking).

Goal 3: Foster HRA Community

Goal 3 will be achieved by supporting collaborations, networking, and increasing the capacity of individuals within HRA member organizations.

Rationale

Community-building, networking, and collaborations provide significant value to HRA member organizations' staff, as highlighted in the verynice report and other sources of information, such as post-member meeting evaluations and previous strategic planning data-gathering efforts. Members noted that HRA does a good job currently at fostering community and that this should remain a priority going forward. What has become increasingly apparent is that virtual events can help us connect in even more

robust ways and can lead us to envision new ways of community-building. HRA should continue to devote resources to what works well but should also explore how to add even more value (e.g., by expanding virtual opportunities, offering professional development training, and enhancing collaboration among members as well as the broader ecosystem).

3.1 Outcome

There is enhanced learning, collaboration, and networking at a variety of HRA convenings including semiannual, regional, or targeted member meetings.

3.1 Strategies

1. Create a “Member Meeting Task Force” to identify opportunities to enhance value of various forms of convenings (current semiannual meetings, theme-based meetings, remote participation, regional/targeted meetings, large national “open” meetings, etc.).
2. Foster community-building in a virtual setting by adding robust virtual attendance functionality, including strategies such as dynamic breakout and networking options, as well as adding other types of sessions.
3. Convene smaller groups around a more targeted agenda for regional and/or topic-based meetings (either virtual or hybrid). Such meetings should be distinct from those of learning communities and cover singular topics rather than ongoing HRA initiatives.

Outcome 3.2

New relationships and collaborations are built due to members connecting and engaging based on shared characteristics and interests.

3.2 Strategies

1. Evaluate interest and value of current interest-based groups (e.g., fundraising, communications, CEO, book group, etc.) and desire for new groups.
2. Enhance engagement in current groups, disband groups not showing value, and create new interest-based groups as interest dictates.

Outcome 3.3

Engagement in HRA activities increases the capacity of individuals in member organizations to be more effective in their careers.

3.3 Strategies

1. Schedule calls with new member organizations (and current and new staff of existing member orgs) to introduce them to all the activities and benefits of HRA.
2. Produce and post on-boarding materials for staff of new member organizations to increase awareness of all available resources, explain how to contribute templates or share information, and indicate where to find resources on the HRA website.
3. Explore hosting additional professional development opportunities for HRA Members.
4. Recognize the contributions of staff from member organizations who fulfill leadership positions within HRA (including board and committee members, plus learning community cochairs) via communication to the HRA membership and to member organizations’ directly.
5. Create an HRA organizational member directory that is easy to maintain and used widely.
6. Create an HRA individual member directory that is easy to maintain and used widely.

Goal 4: Empower HRA Through a Solid HRA Base

Goal 4 will be achieved by identifying and securing the resources necessary to achieve the goals detailed in the 2021 Strategic Plan, thus enabling progress toward achieving HRA's mission.

Rationale

In order to support member organizations, HRA must be a strong and vibrant entity that is ready to provide, facilitate, and coordinate assistance. Goal 1 defines strategies to empower and strengthen HRA itself, along with strategies to secure and strategically allocate resources to enable everything we do.

Outcome 4.1

An expanded breadth and depth of perspectives represented by HRA member organizations.

4.1 Strategies

1. Maintain the current focus on number and diversity (size, mission, public/private, etc.) of HRA member organizations. Organizations that meet HRA's eligibility and are aligned with HRA's mission are encouraged to join. Active recruitment of new member organizations is not necessary unless it is strategic recruitment.
2. Expand opportunities available for staff of member organizations serving a variety of roles (including roles outside of HRA's traditional focus of program or grants administration staff) within their own organizations to contribute to HRA activities. Opportunities can include expanding learning community topics, specifically recruiting for a diverse skill sets for positions in HRA leadership, (e.g., the board, community cochairs, committee representation), and creating additional targeted listservs or interest-based groups such as the CEO Roundtables.

Outcome 4.2

Shared services that members use and find valuable are provided to HRA members.

4.2 Strategies

1. Use HRA's website as a central repository for best practices in grantmaking and in other key issues in biomedical research and training.
2. Expand the listserv functionality.
3. Evolve member meetings to increase value to members.
4. Increase HRA Analyzer engagement and use.
5. Improve HRA Open functionality and increase use by members and grantees.
6. Create and disseminate resources from Learning Communities, meetings, webinars, and other programs.
7. Implementation of a collaborative platform (e.g., Handzin) to facilitate collaboration among members and the broader community.
8. Develop and deploy an annual survey on use and value of shared services (including meetings) correlated to role in the organization.

Outcome 4.3

HRA's capacity to develop additional programs of value has been enhanced by expanding and diversifying both staff and financial resources (including and beyond membership dues).

4.3 Strategies

1. Increase staff capacity through interns, contractors, vendors, and other professional services.

2. Seek additional revenue through supplemental member donations such as in-kind donations (including staff time) or grants.
3. Highlight grants/donations from HRA members prominently on HRA's website, in newsletters, and other materials to both show appreciation for members' generosity and publicize the opportunity to contribute to HRA in ways other than dues.
4. Solicit funds from nonprofits who are non-HRA members as well as potentially for-profit entities (vendors, publishers, etc.)
5. Contingent on HRA's financial resources, explore the possibility of hiring another part or full-time staff member.

Outcome 4.4

The voices of HRA members' individual and collective voiced are amplified, multiplying their impact on areas of importance to the biomedical research community.

4.4 Strategies

1. Solicit periodic feedback from the membership to identify priority areas or areas that are challenging to HRA member organizations (via annual survey and community discussions).
2. Identify and disseminate resources (including members' practices) to improve the research process through policies including (but not limited to) open science, scientific communication, and promoting diversity, equity, and inclusion.
3. HRA staff and HRA members participate in national conversations around topics critical to areas of importance to the biomedical research community.
4. Allocate resources and create infrastructure when new challenges and issues important to the biomedical research ecosystem and aligned with HRA's mission are identified.
5. Maintain HRA's important role as a convener via members meetings, webinars, learning communities, and potentially other opportunities to convene such as regional or open national meetings.
6. Lead and participate in collaborations with groups across various sectors (government, other nonprofits, etc.) that amplify members' voices.
7. Publish infographic(s) using HRA Analyzer data highlighting the impact of HRA member funding and spotlighting biomedical funding trends.

4.5 Outcome

HRA members have access to resources to analyze grant funding data for a wide variety of purposes (landscape and gap analyses, co-funding, identifying collaborators, visualizing trends, etc.)

4.5 Strategies

1. Assess the value of HRA Analyzer to HRA members – determine whether to continue the investment and enhance the platform or terminate it. *(If found valuable implement strategies below.)*
2. Work with developer (either Dimensions or a new vendor) to add functionality members want.
3. Work with member organizations to update and complete funding data in HRA Analyzer.
4. Encourage member organizations to provide data for prior years of grantmaking if they are able.
5. Help HRA members use the reporting and other functionality of HRA Analyzer for their own needs.
6. Provide frequent training and Q&A sessions for the membership.
7. Publish infographics to demonstrate the impact of HRA funding and highlight important trends.
8. During onboarding of new member organizations, highlight the value of Analyzer and the expectation that data be kept current and complete.

CONCLUSION

As the very nice report highlighted, HRA already provides significant value to HRA members. Despite turmoil over the past few years within the philanthropic and scientific communities, HRA remains a strong and vibrant community. In the past two years, 22 organizations have been accepted for membership, two new learning communities have formed, two new programs were launched, and the number of resources developed by HRA staff, and the membership has significantly increased.

The 2021 Strategic Plan must capitalize on HRA's strengths and increase its resilience. To do this, we recommend that HRA provide additional value to member organizations, their staffs, and their stakeholders via strategies set forth in this document. Notably, this strategic planning process is happening during one of the most uncertain times in history. We are in the midst of a global pandemic and ongoing civil unrest. The recent turnover in the White House has led to a major shift in priorities and resource allocation. For these reasons, it is critical that the 2021 Strategic Plan incorporate ways to increase our resilience and flexibility and ensure proper resource allocation. To that end, we are recommending more frequent review of the 2021 Strategic Plan to ensure that goals and programming remain realistic and of the utmost importance. Finally, we recommend the following steps:

1. HRA will create a standing Strategic Plan Evaluation Committee to:
 - Evaluate outputs (Are we doing what we say we will?) in the short-term, then evaluate outcomes (Are members deriving value from the strategies?), and finally the impact (Are the strategies achieving the goals?)
 - Annually audit the implementation and value of activities as well as the appropriateness of resource allocation in preparation for a presentation to the board before the annual budget process (and more frequently if needed)
 - Make recommendations for changes to the plan when needed to adapt to a dynamic research and grantmaking ecosystem
2. HRA will enhance the collection of feedback from the membership on perceived progress toward the goals and strategies in the plan using methods such as:
 - Traditional surveys and analytics (e.g., post-meeting evaluations and website and listserv analytics)
 - Capturing the stories and anecdotes of members' "wins" and sharing those across the membership and more broadly, to celebrate how HRA impacts both individual careers and organizational capacity
 - Collecting levels of engagement, to find out which individuals find value in HRA's resources (capturing their roles at their own organizations and the specific resources they are interested in)
3. The Executive Director will annually provide HRA membership an opportunity to hear progress toward goals and provide comments and feedback using outputs defined in the plan.