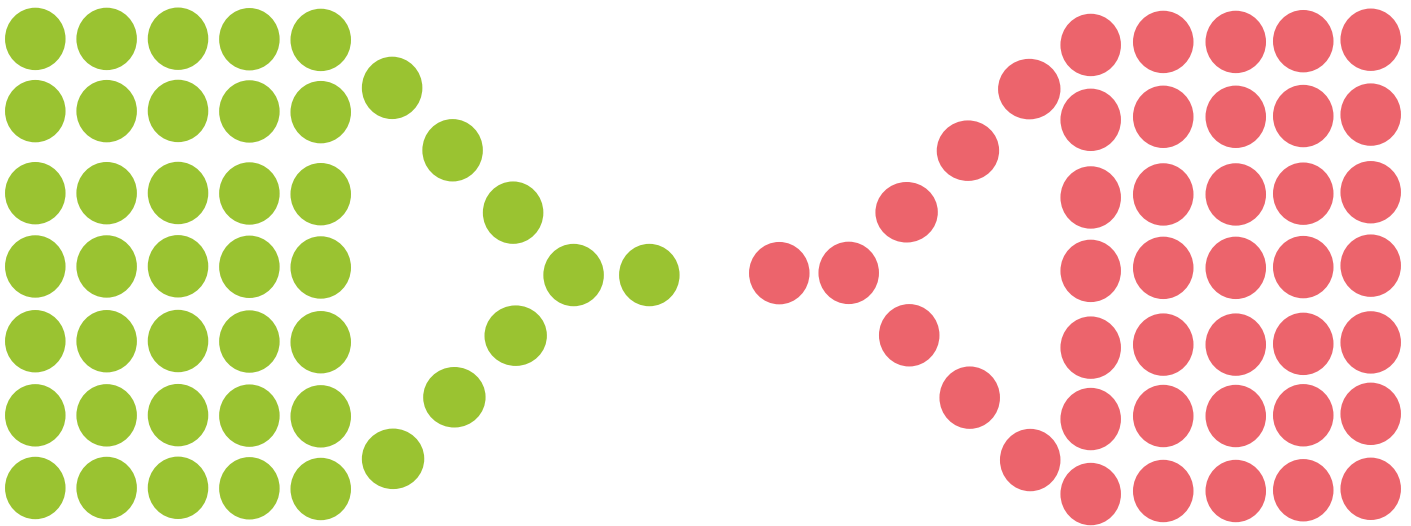




Orthopaedic Research UK
Strategy
2016 - 2021

Pain-free movement for all



Introduction: Managing strategic 'change'

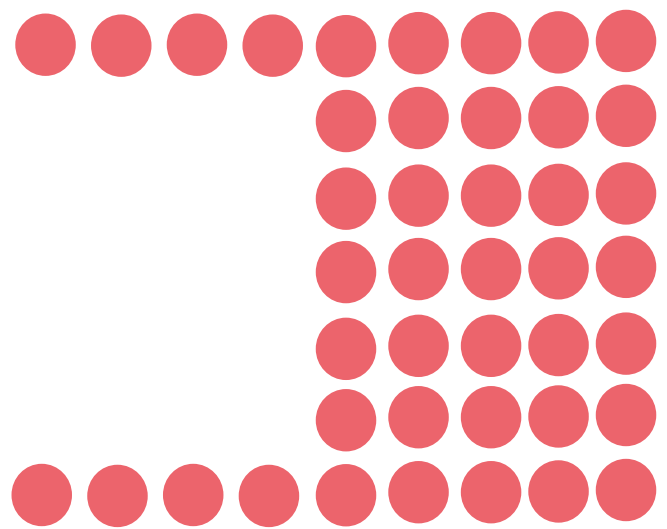
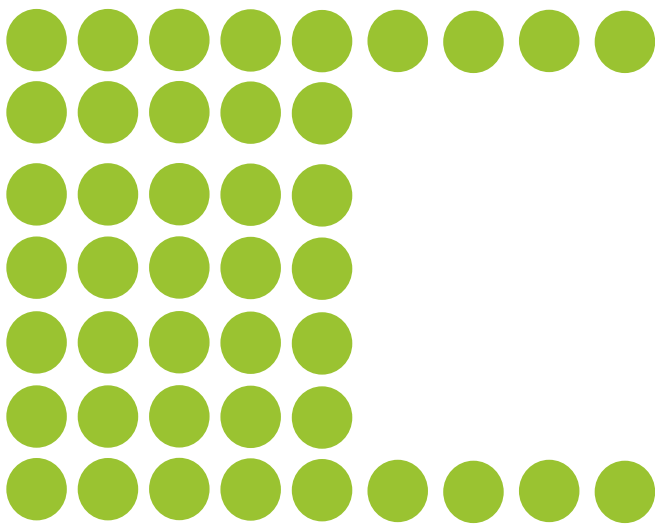
The word 'change' has become one of the most commonly used business terms, especially during the recent global economic downturn. Many organisations had to re-think their strategies and transform themselves to simply survive in recession. Managing change presents challenges for all types of organisations, and is often not an easy one. The most commonly forms of change include: leadership change, budget cuts, culture change, redundancies and change in the way things are done in order to improve productivity within an organisation¹.

Sometimes change happens as a result of external factors, such as change in the government, technology or competition, which may introduce deliberate and planned changes through new policies. Sometimes change arises from within an organisation, whereby it goes through an ageing process and requires a need for a fresh strategy to renew and develop where necessary. It could be a change in roles, duties, operations or complete restructuring of the whole organisation.

Change entails many skills including: understanding, planning, responding sensitively and management by involving people affected by change. It should be looked at as a continuing process of change, aiming to bring success to the organisation, rather than treating it as a series of one-off exercises^{2,3}.

Realistic targets should be set before starting any change process. The following questions should be addressed before taking any steps toward change:

- Why is there a need for change?
- What is needed to be achieved?
- How do we know a change would achieve the objectives?
- Who is affected by change and how?
- How would the affected people react to change?
- Can change be achieved using internal resources?



Different authors have described various approaches to change; most notably, French and Bell (1983) describe change as a goal to improve the effectiveness of the organisation, in that the change is focused on the whole system, which is introduced systemically in a planned interventional manner ⁴. The authors also indicated that change must be applied from the top and gradually downwards throughout the system. Staff commitment is a must to ensure successful change within the organisation. Moreover, French and Bell suggested that the change process should be slow, allowing a complete systemic assessment and control of the strategy. The objective is to achieve a lasting change, rather than a short-term solution.

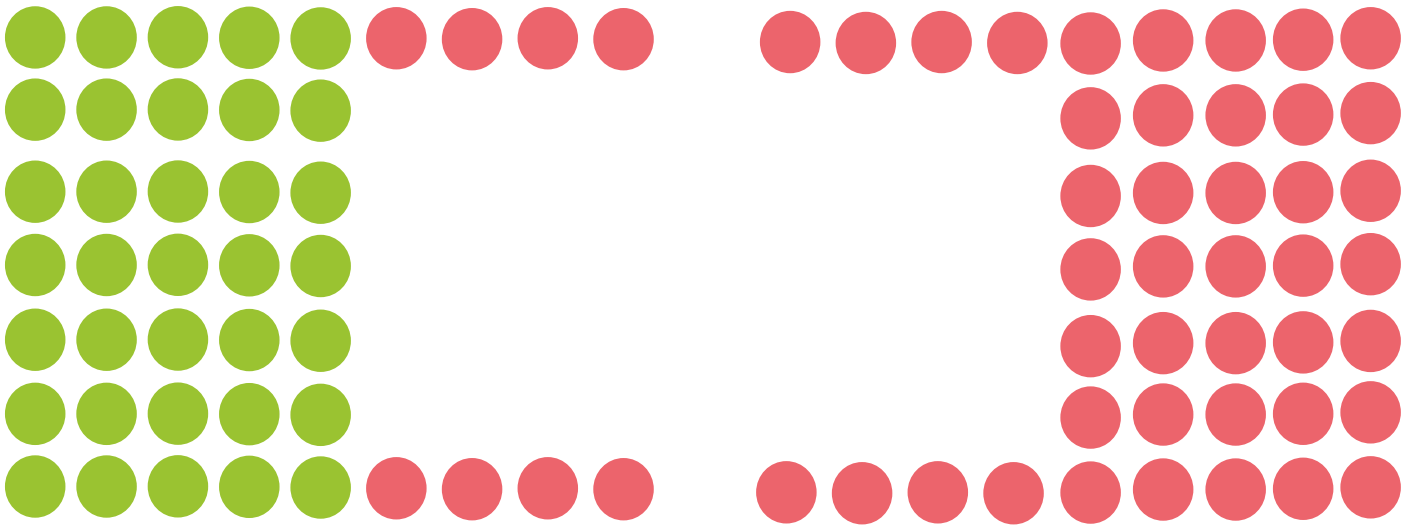
The criticism to French and Bell's model was outlined by Palmer et al. 2007⁵, who considered it an explicitly normative approach and assumes it to be the only one best way to manage change to achieve effectiveness and well-being of the staff within an organisation. Dunphy and Stace (1990)⁶ indicated that the approach does not account for revolutionary change, which is best managed by top-down coercive strategies of change.

Another approach that has been acknowledged by a few authors is to consider change as a dynamic process, which examines the nature, content and process of change as being the focal point to explain the organisational transition⁷. It also evaluates changes in a multidisciplinary context, drawing on a range of perspectives⁸ and explores the process of transition to understand the complex and dynamic processes of change⁹.

“Consider change as a dynamic process”

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Strategy chart

The aim of this report is to formulate a strategic direction for the organisation within a set time frame. An action plan has been devised to manage goals and measure performance. Our staff need to be determined and motivated in order to achieve further improvements in the organisational performance.

Vision

Pain-free movement for all

Mission

Supporting high quality research
Providing education and training
Sharing knowledge
Promoting innovation and collaboration

Values

We endeavour to ensure we conduct our business in a professional, transparent and ethical manner, ensuring total confidentiality and excellent service. We take pride in and are passionate about our charitable work, knowing it ultimately is for the benefit of patients.

Focus

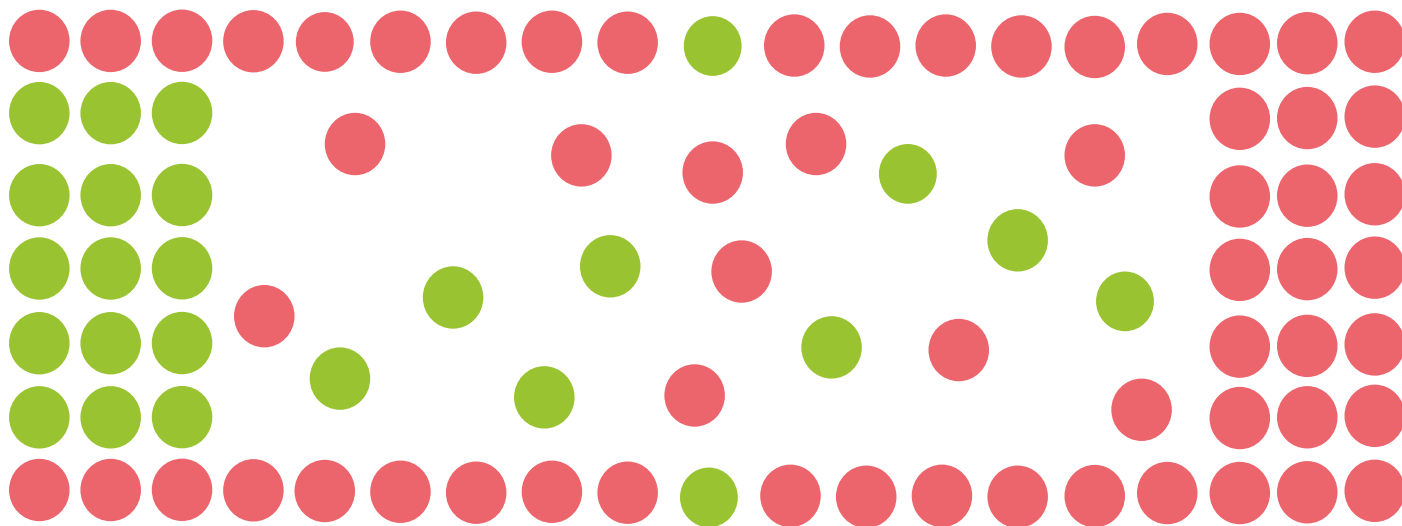
Fundraise to increase our impact in healthcare
Support basic and translational research to end pain and enhance quality of life
Create a varied educational programme of events
Build effective partnerships to expand activities
Effective communication
Inspire and empower staff and volunteers
Engage and influence key opinion leaders



Strategy
2016 - 2021

From donation to innovation

fundraising strategy



Fundraising strategy

By supporting research and education in the field of orthopaedic and musculoskeletal disorders, ORUK aims to improve the quality of patients' lives. Over the last 27 years, the Charity has gained the recognition and respect of the research community who acknowledge that ORUK fills a significant gap in funding research studies that are otherwise not normally supported by larger charities. ORUK has successfully processed over 850 grant applications since 2004, awarding over 130 research grants totalling over £9million, to 40 universities, NHS Trusts and research centres in the UK and overseas.

Thanks to its investment portfolio and to its wholly owned subsidiary, JRI Orthopaedics Ltd (JRI), which contributes a large proportion of its profits to the charity in the form of gift aid donations, ORUK has not needed to fundraise before.

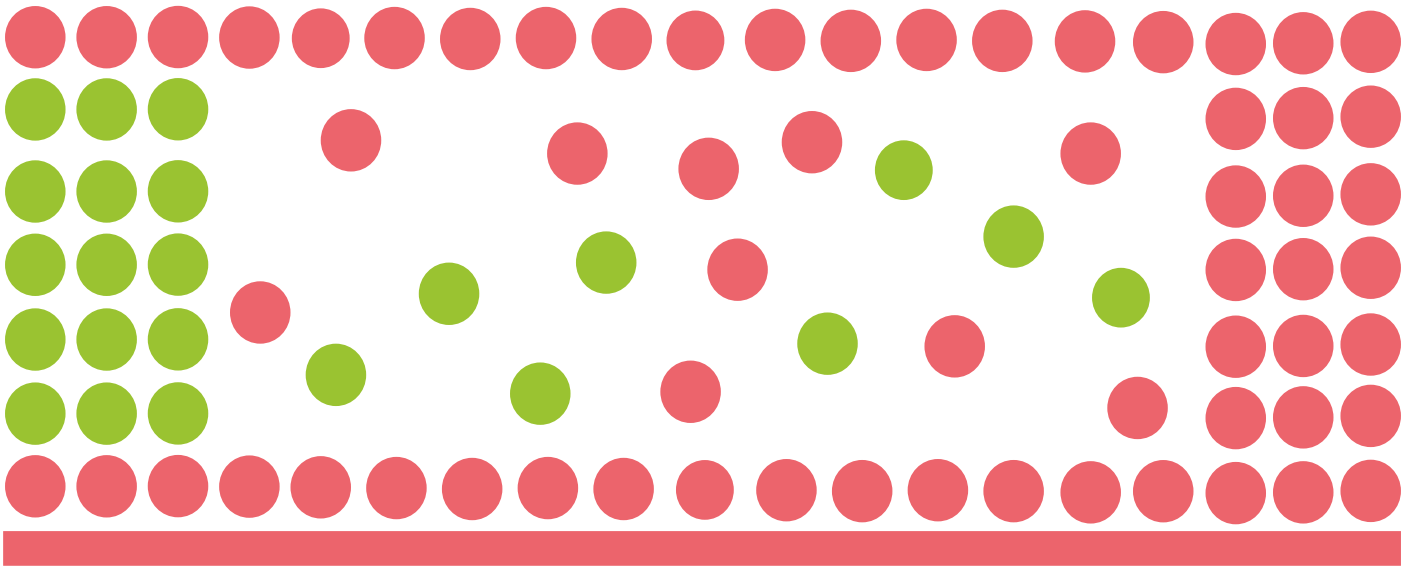
Our fundraising strategy is designed to raise ORUK's profile amongst a diverse community of potential supporters and to secure voluntary funding to support ground-breaking research by leading UK universities into the elimination of bone and joint pain, injury and disease.

We do this by focusing on securing significant gifts from:

- Companies where there is a synergy between their corporate social responsibility programmes and ORUK's research projects
- A programme of fundraising events targeting the above groups as well as wealthy and high profile sports people who engage in sports with a high risk of bone and joint injury
- High net worth individuals with a personal interest in or experience of orthopaedic related issues
- People with a known track record in philanthropy for medical research, including grant making trusts and foundations who support medical research

Maximising **impact** in healthcare

research strategy



Research strategy

One of the main activities of ORUK is to provide funding to centres of excellence to conduct research in the field of orthopaedics and musculoskeletal pathology, in order to benefit patients suffering from such disorders.

However, the majority of research grants awarded to universities will not make it to the healthcare market as products, surgical techniques or novel rehabilitation approaches. Therefore, often grants are made with no expectation of a financial return and very often with limited patient benefit. When researchers generate intellectual property (IP) and a commercial opportunity, it is expected that the sponsor should also share the financial benefits in order to reinvest the money back into its pursuit of its mission.

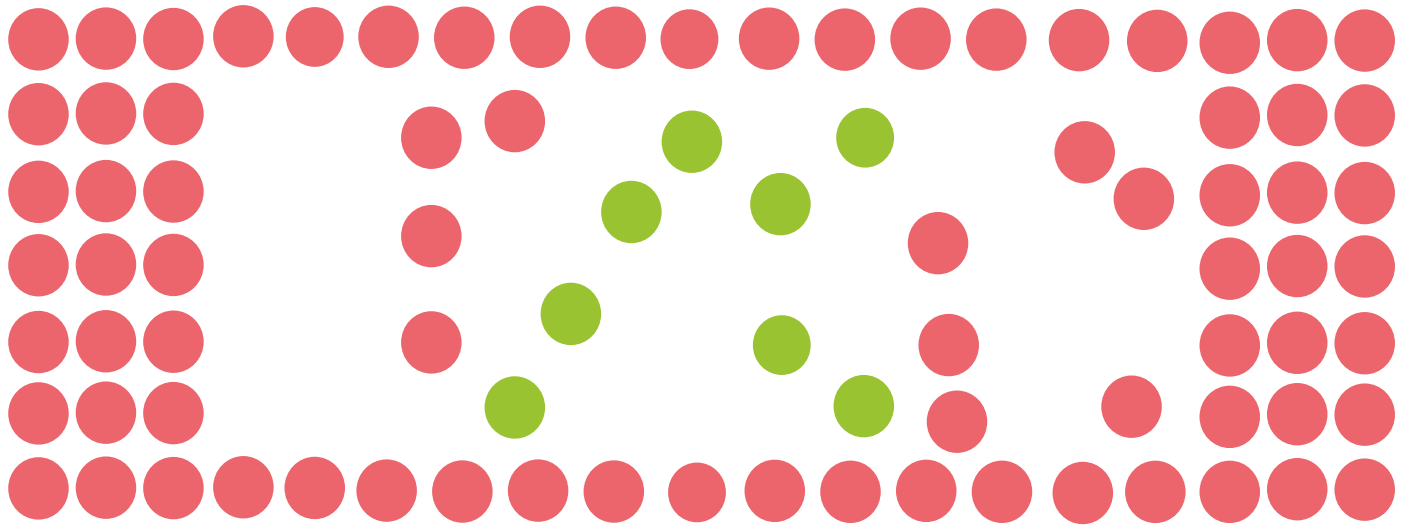
Since 2004, ORUK has invested over £9m which has so far generated nil return on investment. Although ORUK and partners have managed to file 5 patents thus far, the organisation has yet to see the long-term benefits.

Usually larger charities such as Cancer Research UK have their own dedicated technology transfer office with all the legal, technological and business arms to back the innovation process in their organisation. However, for smaller charities with limited resources, promoting translational research may be hard or non-existent.

ORUK is addressing a perceived lack of efficiency to regenerate the money invested in research.

“Publications are important but
impact is vital”

Lord Stern
REF review 2016



Objectives

To promote the innovation process and fund high quality basic and applied research that can be translated into meaningful outcomes for the benefit of patients in the following three categories:

- Alleviation of bone and joint **pain**
- Elimination of post-treatment **complications**
- New surgical techniques and medical devices to enhance **mobility** and **quality of life**

Aims

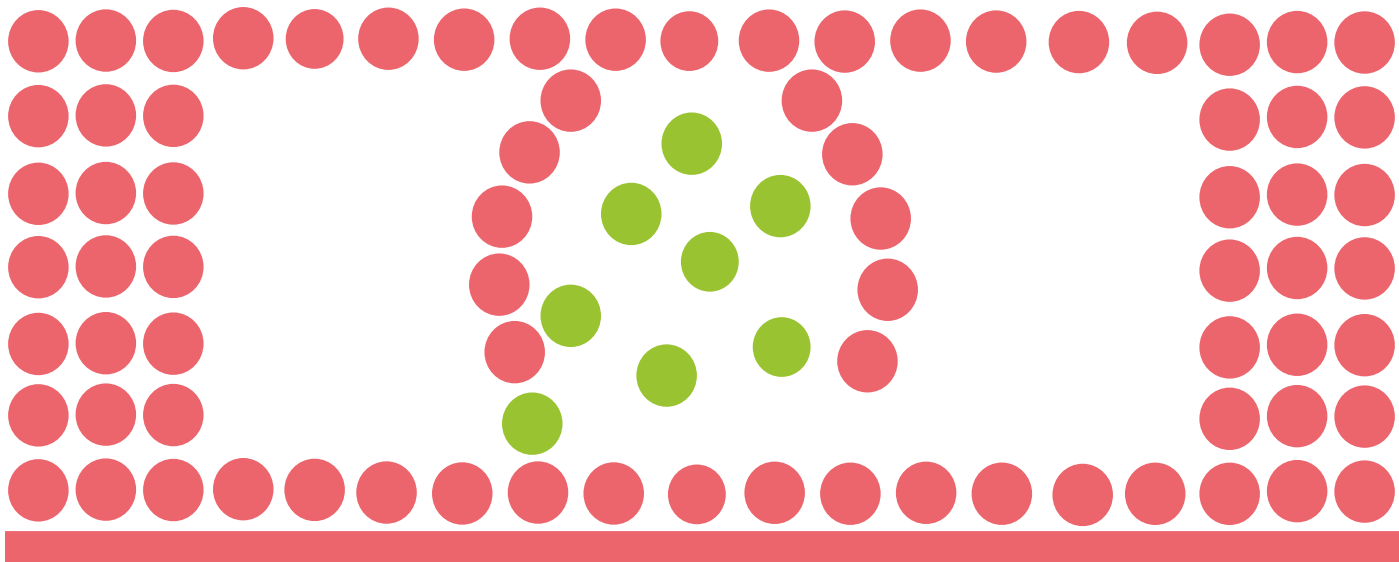
The research strategy will focus on following strategic aims:

- To assemble an effective and relevant advisory committee comprising scientists, clinicians, engineers, industrialists, innovation experts and patients
- To form strategic partnership with corporates to support innovative research
- To identify IP and commercialise innovative ideas
- To be the voice of bone & joint research in the UK



Improving lives by sharing knowledge

events strategy



Events strategy

Over the next five years we plan to deliver a varied educational programme of events that meet the professional training and CPD requirements of healthcare professionals throughout the UK, in a modern and accessible format. Our events will promote the exchange of information and ideas in a relaxed and stimulating learning environment.

The educational programme supports our overall charitable aims and will be financially viable, with each event aiming to break even or generate a surplus.

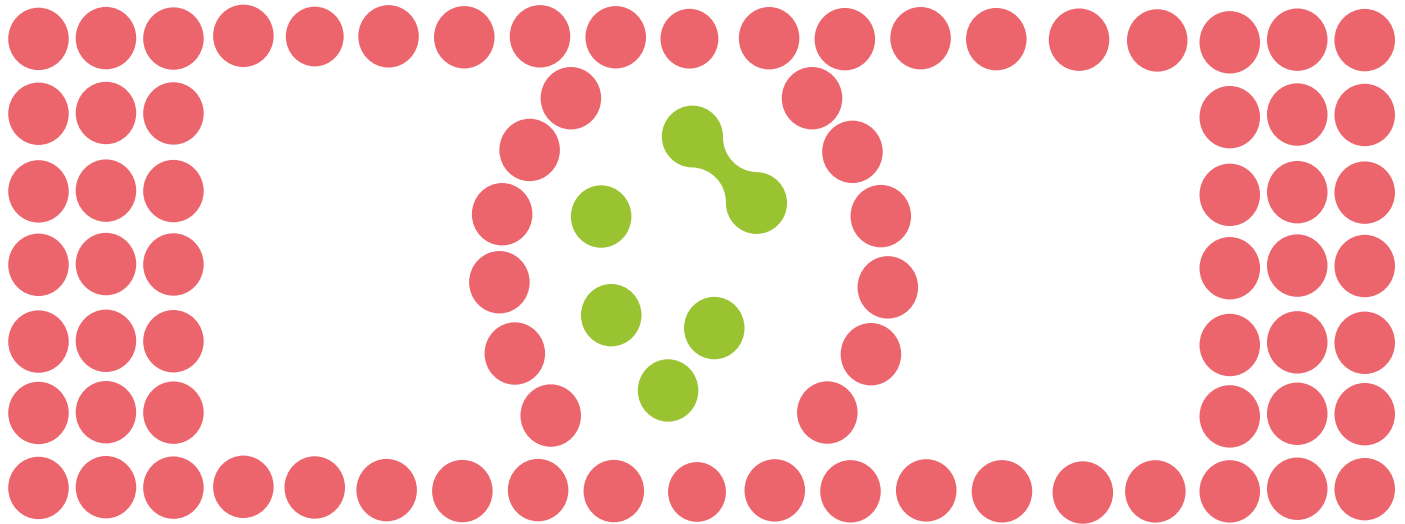
Delivering a diverse educational programme of events

To grow a diverse programme of educational events which appeal to our members and non-members. By increasing our events offering we will offer a greater selection of training opportunities and cater for a wider audience. We will work closely with our SAC and other key opinion leaders to develop varying and topical CPD accredited events. We will offer differing event formats; some hands-on largely interactive events and some traditional didactic lectures, some intensive 3 day courses to some shorter evening events. Our aim is to develop:

- 10+ events from April 2016 – March 2017
- 15+ events from April 2017 – March 2018
- 20+ events from April 2018 – March 2019

Raising our profile

Through the development of high quality educational events we will raise the profile of the organisation. By engaging thought provoking/key opinion leaders as speakers and meeting organisers and discussing current/hot topics we hope to raise the standard of our events thus engaging more delegates.



Increasing awareness

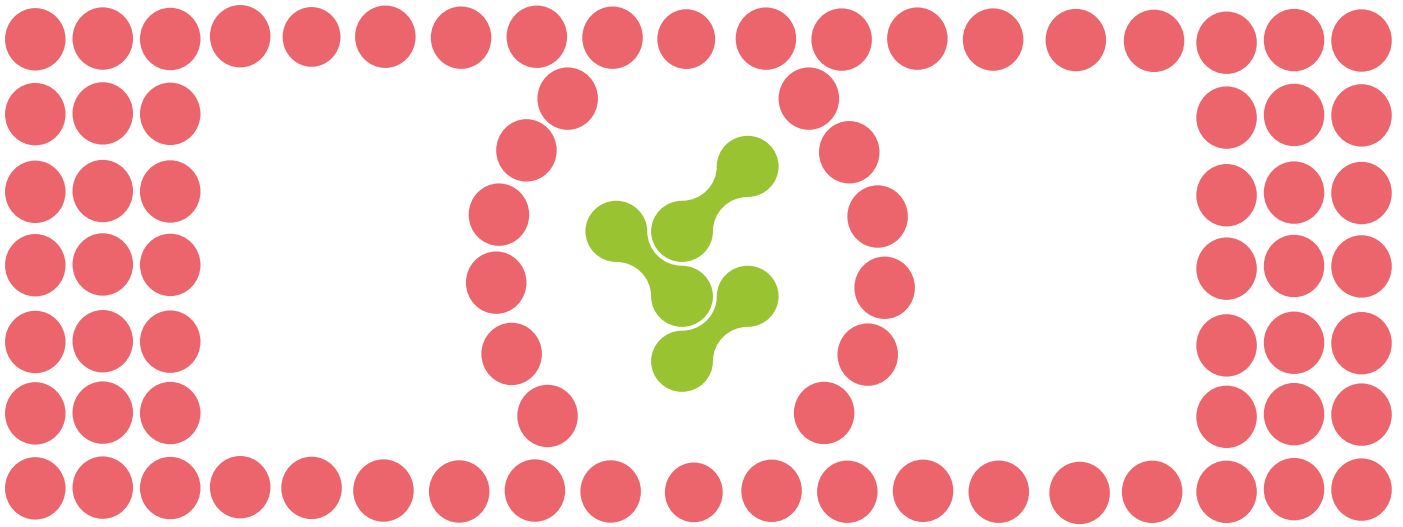
ORUK's registered users are largely based within the UK with some international members. It is fundamental that there is appropriate and effective communication across the membership and to all stakeholders. Increasing the number of events and expanding to these to all regions throughout the UK will raise the organisations footprint and subsequently increase membership.

Building external relations with all stakeholders

ORUK will seek to engage and educate all stakeholders in matters of orthopaedic science pertaining to health and disease. We aim to forge new relationships with other medical organisations as well as strengthen those existing relationships with our sister societies. We aspire to develop a number of collaborative events with external organisations, as we believe working together in sharing knowledge is beneficial to our members and the wider audience. We believe in the importance of building mutually beneficial relationships with industry, as industry presence can give an added value to our events as companies are able to share knowledge on new innovations and current and emerging techniques with delegates, as well as providing financial support.

Promoting and providing a knowledge exchange forum

We believe in the importance of sharing knowledge, research and experiences within the orthopaedic community. We strive to provide a relaxed and supportive learning environment in which all delegates/stakeholders feel able to share their knowledge, ideas and experiences with peers. Our events are highly interactive and offer ample networking opportunities. We provide delegates with the opportunity to engage closely with course convenors/speakers and try to build in small group discussions opportunities within our programmes.



Remaining abreast of educational changes and developments

The approach to and delivery of education in the UK has undergone significant changes over the last decade. Whilst the traditional didactic format is still valued, hands-on training and skills workshops, facilitated by clinicians are becoming increasingly common and sought-after. Many of our events already offer this style of teaching, we provide hands-on training courses, some of which are entirely interactive. We need to remain abreast of changing organisational needs within the National Health Service and the shifting work-life equilibrium of individuals when considering our provision of education.

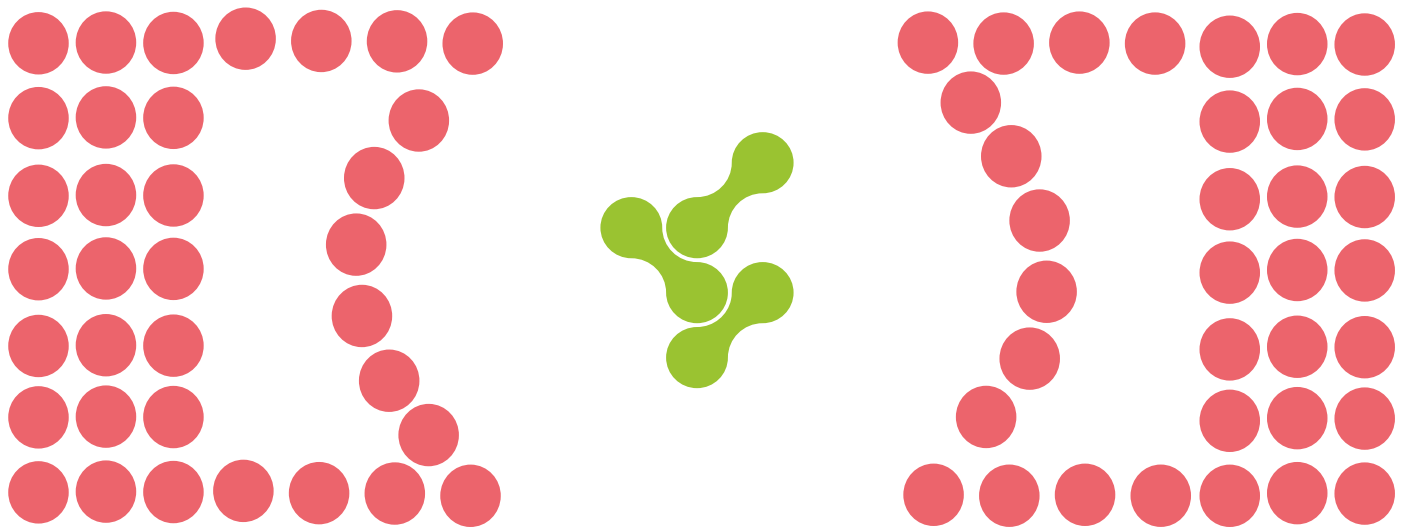
Employing innovative approaches to programme delivery

We strive to ensure our events are delivered in a modern and accessible format and employ interactive elements wherever possible. We need to consider the provision of online learning, making education further accessible to our members around the globe as well as those in the UK. The organisation must keep abreast of new innovative methods of programme delivery, trialling these where appropriate.



**The voice of
bone & joint
health**

science & communication strategy



Science & communication strategy

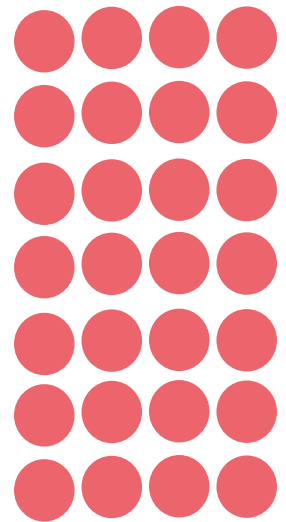
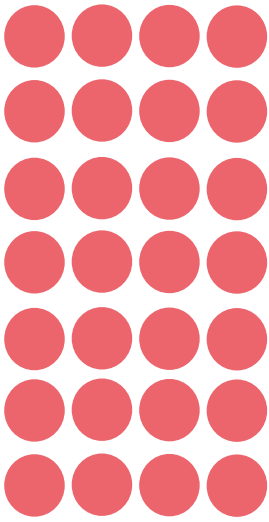
As a medical charity, our main goal has been to provide funding for clinicians and scientists, enabling them to carry out research and advance knowledge in the field of orthopaedics. This approach has led to some outstanding science but has also disconnected our organisation from the general public. Our aim is to become a public facing organisation and therefore a radical change in strategy is required. The following strategy approaches can offer ways that can lead to the realisation of our goal within a short period of time.

Public understanding of science

One of the main activities of ORUK is funding research. Our organisation needs to be more efficient in disseminating research findings to the public. More often than not, the general public assumes that scientific research is somehow too complicated to comprehend. Disseminating scientific information via our website is key for allowing the general public to engage with our research, as it allows people to become more familiarised with our organisation and develop an understanding for the research projects we fund and how this has an impact on society. We have been asking our researchers to explain their research in lay terms and our next goal is to share this directly with the public. This will allow people to engage and learn more about us and in turn could raise our profile as a public facing medical charity.

Making science accessible

The gaps between our researchers and the general public needs to be filled. This can happen by engaging with both sides to allow for events and instances where those who suffer from a certain condition (patients) and those who are looking to tackle the existing problems (scientists and clinicians) meet and socialise. Furthermore, patients and the general public will also be encouraged to visit and engage with researchers. This will provide a relaxed and supportive exchange forum, where individuals feel able to share their ideas and experiences. By becoming a functioning bridge between scientists and the general public, ORUK can raise its profile by making science accessible to the public.



Online and social media

As technology advances in our society, the need for organisations to interact and engage with their audience through the digital medium becomes vital. ORUK is no exception to this rule, we aim to regularly disseminate information through social media platforms. These platforms allow us to share knowledge about science, education and events, as well as raise our profile in order to attract potential funders.

The “bone and joint health” campaign

Because ORUK has a widespread interest in all bone related disorders and diseases, we cannot focus on a single condition. In fact, we need to act as an umbrella organisation that allows for further education of the public regarding all things related to bone health. This requires ORUK to change its current strategy and become a campaigning charity promoting this ideal. The following points highlight some of the possible changes that could be relevant in this new proposed campaign and could lead into ORUK becoming the voice of bone and joint health in the near future. As a growing organisation we intend to attract the general public to become more physically active to promote bone and joint health.

- Enhance** ORUK needs to act as a catalyst for change, encouraging families, schools, workplaces to help create a more active society
- Inspire** By holding events around the problem of “movement” within the society, we can gather a wide range of experts and organisations
- Influence** Encouraging and engaging policymakers at local, national and international levels to promote an active life-style for the general



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