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FOCUS
Strategic Plan

ukclinicalpharmacy.org

Strategic Plan

Strategic Plan 2023-2028

A long-term plan is required to set out the direction of UKCPA over the next five years.

It will allow:

- **the Board** to agree on the objectives of the association and assign budgets and resources appropriately.
- **specialist Committees and incoming Board members** to understand the direction of UKCPA, which in turn will increase cohesiveness between Board members, and between the Board and the specialist Committees.
- **members** to understand where the organisation is investing their membership fees and the rationale behind these decisions, and so that they can see the intention of growth and expansion of member benefits.
- **staff** to understand the vision and direction, and how different work streams fit together, thus improving communication and team working.

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Mission and vision statements

Mission statement

“To unite the clinical pharmacy community, from wide-ranging specialties, professions and sectors, to enable the delivery of outstanding pharmaceutical care, ensuring that patients receive the best possible outcome from their medicines”

Vision statement

“Our vision is to provide an inclusive community for pharmacy professionals from wide ranging specialties and sectors. We will do this through the provision of high quality education, sharing expertise and through supporting, inspiring and fostering professional growth amongst our members. We will remain relevant and valuable at every stage of our members’ careers.

On behalf of the clinical pharmacy community, we will act as an advocate and seek to influence the wider healthcare world, through engaging with national and international organisations, producing and contributing to national guidelines, and developing and influencing initiatives which impact on the whole pharmacy profession.”

Tagline

“We are clinical pharmacy.”

Where do we want UKCPA to be in five years' time?

UKCPA has two core purposes: *Education and Community.*

Education

UKCPA has an excellent reputation for providing high quality, relevant and timely education. We need to maintain and build on this in order to continue to grow.

The education we deliver is developed by expert practitioners; this grassroots development of content brings relevancy and timeliness to the working practitioner. Our expert speakers, supported by our robust quality assurance process, assures our delegates of exceptional standards.

In order to provide for, and attract, members across a breadth of specialities, we need to deliver education which is relevant within the whole range of clinical specialities as well as covering issues affecting the whole profession. Equally, we need our education to be relevant to the broad spectrum of levels of practice, from newly qualified through to advanced.

We need to be aware and proactive in our planning of education to cover emerging skills and knowledge requirements of practitioners, such as independent prescribing upon qualification from 2025 onwards.

We also need to recognise the expanding knowledge requirements of other pharmacy professionals, such as pharmacy technicians and pharmacy assistants, and understand how teams of professionals work together to ensure that our education provision is relevant and valuable across the whole pharmacy workforce.

The COVID pandemic accelerated the acceptance of remote learning (such as webinars) and this continues to be a desirable mode of learning. UKCPA needs to understand the advantages and disadvantages of remote versus in-situ learning, the preferences of our members and delegates, and the ways in which different modes of learning can be used to their maximum benefit. Education needs to be delivered in ways which suit our members' preferences, whilst also meeting their learning and development needs.

***Overarching aim for Education:** To provide high quality, relevant and timely education for the pharmacy workforce across the breadth of specialities, as well as covering issues affecting the whole profession. Education will be a mix of remote and in-situ, throughout the year, and will cover different levels of practice from post-registration to advanced.*

Community

As well as providing education, UKCPA is seen as an umbrella organisation for communities of practice. A sense of community can be provided through educational events, particularly networking at in-situ events, forming specialist Committees, providing online forums and facilitating projects and initiatives.

The UKCPA communities should be inclusive, friendly and supportive and welcome members working in any sector, specialty or level of practice. They should be spaces where members can find support, advice, guidance, resources and opportunities for professional and personal development.

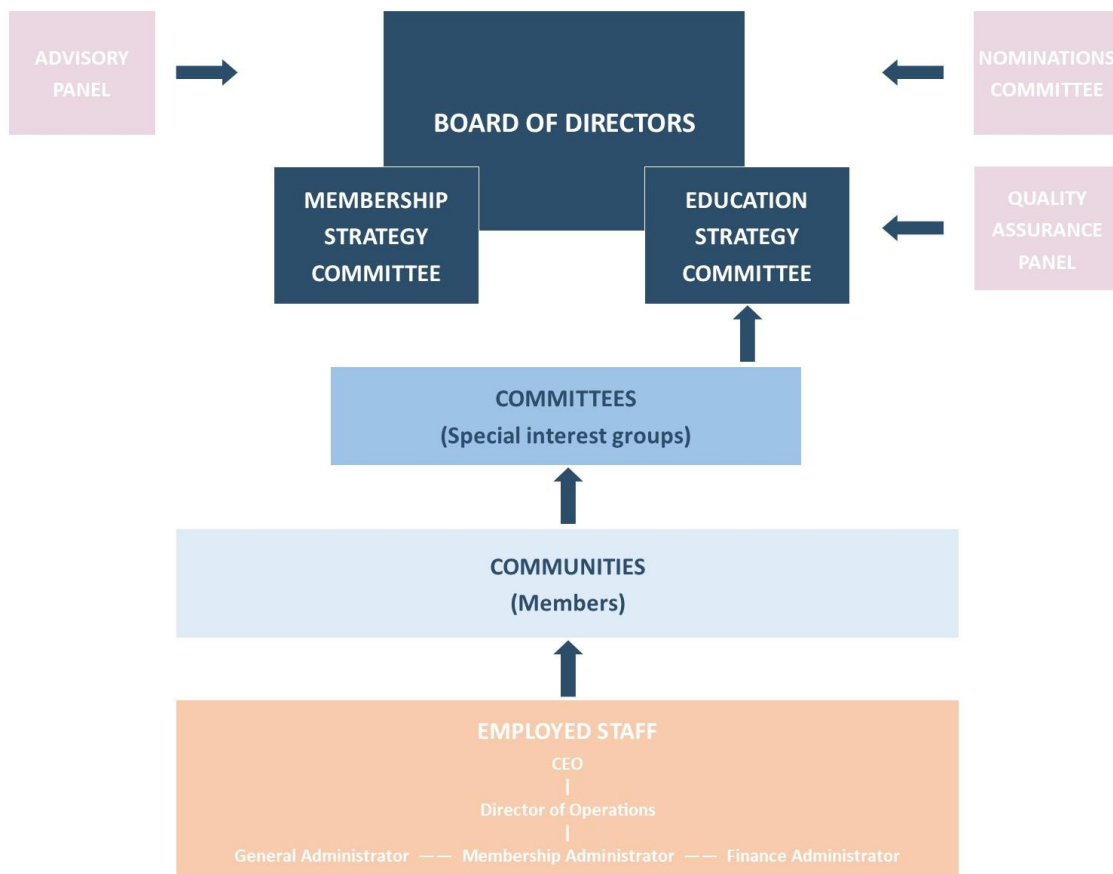
As significant custodians of their community, the UKCPA specialist Committees should be supported by the UKCPA office to build and nurture their communities. Each community should offer opportunities to its members for professional and personal development, such as involvement in the Committee, writing articles, speaking at educational events, project work, and input into consultations and guideline development. UKCPA staff should be enabled to support and facilitate the provision of these opportunities.

Communities can also be nurtured through working together towards a common goal. One way of doing this is to provide a collective voice for our members for issues they care about. As such, advocacy is a new area in which UKCPA should invest.

Investment in technology which enhances the building and nurturing of our communities should be a priority.

Overarching aim for Community: *To develop the UKCPA communities into inclusive, friendly and supportive spaces for our members, where any member working in any sector, speciality or level of practice can find relevant advice, guidance, resources and opportunities for professional and personal development.*

The UKCPA governance structure



High level strategic plan

Education

***Overarching aim for Education:** To provide high quality, relevant and timely education for the pharmacy workforce across the breadth of specialities, as well as covering issues affecting the whole profession. Education will be a mix of remote and in-situ, throughout the year, and will cover different levels of practice from post-registration to advanced.*

Meeting the needs of the whole workforce

UKCPA currently has 16 Committees focussed on specialist areas of practice. This is a key selling point for membership and distinct from other clinical pharmacy membership organisations who tend to only specialise in one area of practice. In order for UKCPA to attract prospective members we need to be able to guarantee that regular education is delivered within each of these specialist areas. We also need to seriously consider delivering education in areas which are not currently covered by our specialist Committees (such as oncology or mental health), in order to deliver the full breadth of practice areas encountered by the pharmacy workforce. This may involve collaborations with other specialist organisations.

Historically and currently, UKCPA tends to deliver education at the more advanced level of practice. In order to reach a broader range of practitioners, our education provision needs to be relevant to the broad spectrum of levels of practice from newly qualified through to advanced.

The majority of UKCPA's membership is hospital-based pharmacists. However, we recognise the value of our education to pharmacists working in other sectors such as GP surgeries and the community, and to other pharmacy professions such as pharmacy technicians and pharmacy assistants. In order to grow, we should ensure that our education provision is relevant and valuable across the whole pharmacy workforce.

To deliver on this vision, a review of existing and recent educational content is required to identify gaps in provision. We also need to identify any barriers and facilitators to providing regular education within specialist areas or levels of practice. Following this, we will be able to develop a strategy which enables us to fill those gaps and address any barriers.

Planned and flexible programme of education

UKCPA should have an annual programme of educational events which covers the breadth of specialist areas of practice and the spectrum of levels of practice. The annual programme will be planned ahead

but will also have the flexibility to incorporate more spontaneous content if required. This would allow UKCPA to guarantee to prospective and current members that we regularly provide content on defined areas and levels of practice. It would also allow a more proactive approach to planning education which would benefit both speakers and administrative staff. As well as ensuring that our education provision covers core topics on an annual basis, there will be some key areas which require additional education at certain points in time, such as incoming cohorts of newly registered pharmacists who are able to prescribe from 2025. A level of flexibility in the programme would also allow for spontaneous content to deliver education around issues which are emerging or unexpected.

Modes of delivery

UKCPA currently delivers education through remote webinars, in-situ masterclasses and an annual conference. The remote webinars are extremely well attended and have been welcomed by members as a key benefit which is convenient for their busy working lives. In-situ masterclasses are slowly being reintroduced post-pandemic and will require monitoring in terms of attendance and suitability for members and delegates.

UKCPA has delivered conferences for many years, but the attendance rate has been slowly decreasing for many reasons such as the inability to take time off work, the inability to get funding to attend, and an increasing number of competitor events. Despite delivering our conference remotely in 2021 and 2022 to counteract the demands on time and finances, attendance remained low.

We have committed to delivering an in-situ conference in November 2023; however, a full review of the benefits and costs of delivering an annual conference is required, together with the desires of our members and the wider profession for such an event.

eLearning is another remote way of delivering education. Whereas UKCPA webinars and remote conferences are 'live' (ie viewed in real time), eLearning can be accessed at any time and without the need for a speaker or tutor.

UKCPA began to investigate the benefits of eLearning back in 2019 to address the decreasing ability for members to take time off work and find funding for in-situ learning. We commissioned a pilot eLearning course on Antimicrobial Stewardship to analyse the time and financial resource required to produce high quality eLearning material. When we introduced remote learning via webinar in 2020 due to the pandemic, we addressed the issues that delegates had regarding time and money to access in-situ education. However, remote learning is not a complete panacea or easy replacement for in-situ learning: primarily, the value of networking at in-situ events is not easily replicable.

UKCPA needs to re-visit the concept of providing eLearning as a key way of delivering education. A review is required to assess the value against the costs and the preferences and needs of our members and delegates.

Required resources

To deliver on these objectives, we need additional resources. A salaried Director of Education, with appropriate administrative support, is required to work specifically on the education provision of UKCPA. In broad terms, their role will be to plan our annual programme of events in collaboration with our specialist Committees, other organisations or by commission, as required, and horizon scan for emerging issues throughout the year which affect practitioners. In addition, they will be cognisant of the available modes of delivery and the needs and preferences of our members and delegates. A review of the annual conference will also be part of this role; if the review concludes that an annual conference is still of benefit to the profession and the organisation, the salaried Director of Education would incorporate the delivery of this into the annual education programme.

Actions required:

- Recruitment of salaried Director of Education
- Gap analysis of education provision
- Identification of specialist Committees' barriers and facilitators to delivering regular education
- Horizon scanning of emerging issues requiring knowledge updates
- Review of costs and benefits of conference provision
- Revisit the concept of eLearning to review the value against costs, and the preferences and needs of our members and delegates, of delivering eLearning as part of UKCPA offering.

Community

Overarching aim for Community: *To develop the UKCPA communities into inclusive, friendly and supportive spaces for our members, where any member working in any sector, speciality or level of practice can find relevant advice, guidance, resources and opportunities for professional and personal development.*

As well as providing education, UKCPA is seen as an umbrella organisation for communities of practice. A valuable role of educational events, particularly those in-situ, is to facilitate the gathering of individuals with common areas of practice and provide networking opportunities. However, UKCPA can, and does,

utilise other methods to foster community-building such as forming specialist Committees, providing online forums and facilitating projects such as the Handbook of Perioperative Medicines.

A home for practitioners

It is important that our communities are inclusive, friendly and supportive and welcome members working in any sector, specialty or level of practice. They should be spaces where members can find support, advice, guidance, resources and opportunities for professional and personal development.

Our communities should be regularly reviewed to ensure that they meet the needs of our members, both in terms of focus and activity. A regular review will ensure that all communities are relevant: that new communities are created when needed, that similar communities are merged, and that obsolete communities are removed.

The role of the specialist Committees

The UKCPA specialist Committees are to a large extent the custodians of their community. They should be supported by the UKCPA office to build and nurture their communities. In order to provide our Committees with the support required to do this, a regular review of activity of each community is required and requirements for support identified. There should be a minimum level of activity per community in order to meet the needs and expectations of our members; additional support and resources should be implemented if activity falls below this level.

Personal and professional development opportunities

Each community should offer opportunities to its members for professional and personal development, such as involvement in the Committee, writing articles, speaking at educational events, project work, and input into consultations and guideline development. UKCPA staff should be enabled to support and facilitate the provision of these opportunities.

Leading professional standards

UKCPA has long been a leader in developing national standards, guidelines and initiatives. From professional curricula to credentialing assessments to internationally used guidelines, these are activities which not only improve professional practice and patient care, but also showcase the expertise within UKCPA, enhance our reputation and attract members. These projects are also valuable community-building exercises: bringing enthusiastic individuals together to work on something meaningful and valuable, and communities and specialist Committees should be supported to develop standards and guidelines.

Technology

The use of technology can enhance the building and nurturing of our communities, such as ensuring high and regular activity on the online forums and providing easy access to inspirational and informative resources online. Regular reviews of the functionality of technology to foster communities and investment in online platforms to deliver this should be a priority.

Advocacy

Communities can also be nurtured through working together towards a common goal. One way of doing this is to provide a collective voice for our members for issues they care about and to use and grow our influence for the greater good of the profession and patients. This advocacy role would have the additional benefit of raising awareness of UKCPA and further building the sense of community, thus closing the loop. An Advocacy Panel should be convened to appraise issues in terms of urgency, importance and scale, and decide on the level of involvement.

Actions required:

- Regular review and appraisal of communities (areas of practice) for relevancy and to identify gaps
- Approaching appropriate expert practitioners to lead new communities
- Annual review of each community to appraise activity, assess availability of resources and to identify support required
- Provide support to specialist Committees and communities to develop standards and guidelines
- Regular review of the functionality of technology and investment in online platforms to deliver Strategic Plan
- Implement Advocacy Panel

Supporting strategies

STRATEGY: Marketing & Branding

A strategy that raises awareness of UKCPA, its activities, and member benefits amongst the clinical pharmacy community and beyond.

In Quarter 1-2 of 2023 we will launch our new brand and technology platform.

The new branding will appear on all our online sites, social media channels, email signatures, correspondence, reports and publications.

Following the launch of the technology platforms, we can start to develop specific marketing campaigns for particular sectors of practice. We will have a stable technology platform which delivers more than the current platform, including a mobile-friendly discussion forum, as well as a record of accomplishment of free webinars. We can promote these tangible benefits.

Our own research has shown that only around 25 percent of pharmacists working in the hospital sector are members of UKCPA. Therefore, there is huge potential to increase our membership in that sector, as well as reach further into other sectors. The implementation of newly qualified pharmacists' ability to prescribe upon registration from 2025 could be a key opportunity. In addition, pharmacy technicians are also a huge potential market for UKCPA.

Significant budgets will need to be assigned to specific marketing campaigns. Intelligent use of social media will be required, including paid advertising, and this may require external consultants.

Target sectors will be (in chronological order):

- Secondary care
- Primary care, including community pharmacy
- Pharmacy technicians
- Students and trainee pharmacists

- Non-UK pharmacists
- Non-pharmacist healthcare professionals (eg prescribing nurses)

Each marketing campaign should include:

- A specific target audience (ie sector or group of individuals) or a specific member benefit (eg webinars, forums, professional development opportunities)
- Delivery/communication method (eg social media, external exhibitions/events, flyers, films, face to face visits to NHS Trusts/Universities, etc)
- Timelines
- Resources required

Throughout the strategy and associated campaigns, the branding, messages and ‘personality’ of UKCPA should remain strong and consistent.

STRATEGY: Advocacy

A strategy which allows UKCPA to appraise issues affecting the profession and its members in order to determine which issues are appropriate and feasible for UKCPA to advocate for.

Advocacy serves multiple purposes:

- Providing a collective voice for our members for issues they care about
- Using and growing our influence for the greater good of the profession and patients
- Raising awareness of UKCPA (marketing)
- Building the sense of community (strengthening our core purpose)

UKCPA can engage in advocacy by:

- Horizon scanning can identify issues in advance and allow a longer-term planned involvement.
- Appraising unforeseen issues in a reactive way.
- Issues can be taken on a case-by-case basis and appraised individually.
- Appraisal will involve assessment of:
 - urgency of issue
 - importance of issue
 - scale of issue
 - appropriateness of UKCPA to be involved
 - appropriate level of activity/involvement required
 - collaborations with other organisations
 - resources required.

- An appropriate level of involvement should be selected, depending on the issue and the outcome of the appraisal. For example, raising awareness may involve a social media campaign and/or press releases; more intensive involvement may involve collaborations with other organisations, media interviews, letters to government ministers etc.

- Issues will differ in terms of scale of impact. Issues may affect the whole profession, or only a proportion of the profession. Alternatively, issues may affect patients or a subsection of patients. The scale of impact will be a factor in the appraisal.

- Advocacy Panel
 - It will be necessary to convene an Advocacy Panel, which horizon scans potential issues and receives notification of issues from members and specialist Committees and conducts the appraisals for each issue.
 - The Panel will appraise each issue, which will be required to be submitted on a template format, outlining urgency, importance, scale etc (as listed above).
 - The Panel should consist of representatives from the Board of Directors and the specialist communities.
 - The Panel will meet every 3-4 months to appraise issues and determine whether UKCPA should be involved, and to what extent.
 - The Panel will also discuss any support required for this work, such as media training etc.
 - A budget will need to be set for this advocacy work.

- Communication to members will involve describing what we mean by advocacy and using specific examples, and how UKCPA can be an influencer for issues affecting them.

STRATEGY: Communications

A strategy which effectively communicates to the external world, as well as internally within the organisation.

External communication

Communication to the external world should effectively showcase the benefits and activities of UKCPA, including those of the specialist Committees.

Elements to consider include communications directly to members as well as communications outside of the membership.

Communications should be tailored to the audience they are intended for, in terms of language, tone and method of communication, and should consider:

- The specific target audience (ie sector or group of individuals) or a specific member benefit (eg webinars, forums, professional development opportunities)
- Delivery/communication method (eg social media, external exhibitions/events, flyers, films, face to face visits to NHS Trusts/Universities, etc)
- Timelines
- Resources required

Ways of communicating could include:

- Email
- Social media
- Bulletins/newsletters
- Meetings
- Presentations
- Surveys

- Printed material (note that this should be minimal in order to meet our sustainability goals)

Content of communication will vary, but could include:

- Factual updates on membership (eg changes to subscription fees, notification of transactions, reminders of subscriptions)
- Notifications (eg upcoming events, new member benefits, committee vacancies, meeting information)
- Requests (eg for speakers, representatives at external meetings)
- Celebration of achievements
- Updates on activities (eg strategic plans, input into national projects, investments into member benefits)
- Feedback for information or improvements (eg events, member benefits, advocacy issues)

Internal communication

Effective and timely internal communication within the association is vital in order to maintain awareness of activities, plans and progress.

Internal communication can include:

- Between the CEO, Director of Operations and administrative staff
- Between the Board of Directors and the CEO and staff
- Between the specialist Committees and the Board of Directors
- Between the specialist Committees themselves

Communications should be tailored to the audience and content, and can be in the form of:

- Emails
- Bulletins/briefings
- Meetings and discussions (online or F2F)
- Meeting minutes
- Presentations

- Surveys

Communications should be clear and as concise as possible.
Any actions required should be clearly highlighted, with deadlines set.

Consideration for individual's time should be given, and should inform the method of communication (ie a visual presentation may be more time-effective than a long written document).

Consideration should be given the frequency of communications. Information should be regularly provided and balanced against time required to send and receive the information.

STRATEGY: Human resources

A strategy which ensures that the strategic aims and objectives of the association are supported by appropriate numbers and skills of employed staff and external consultants.

The Human Resources strategy should ensure:

- stability
- succession planning
- appropriate skill mix
- a well-balanced team
- resilience against periods of additional workload
- adequate time for reflection, critical thought and creativity
- adequate time and opportunity for professional development
- a satisfactory work-life balance
- that UKCPA is an enjoyable, exciting and supportive workplace.

The strategy should ensure that the appropriate number, skills and responsibility levels of staff are in place in order to adequately and effectively deliver the strategic plans of the association.

Elements to consider:

- Regular review of staffing team in terms of sufficiency and skill mix
- Automatic consideration of human resources required when new or additional workstreams are discussed
- Development of attractive remuneration packages to attract and retain valuable staff, including salary, training, opportunities for professional development, flexible working and other work-life balance initiatives

- Use of external resources (eg consultants, advisors) where required in order to support salaried staff and provide required expertise
- Consideration for the wellbeing of staff through satisfactory work-life balance, sufficient training and support, and a supportive and empathic working environment.
- Ensuring the association complies with employment law
- Regular monitoring of employment law and implementing changes where appropriate
- Regular appraisal to ensure equality, diversity and inclusion within staff.

STRATEGY: Technology

A strategy which ensures that technology is used to the greatest effect within the resources limits of the organisation.

This can be subdivided into two main areas:

- **External technology** includes any technology that is used outside of the UKCPA office (ie by members or the public): the public website, the member portal, Rx magazine, webinar platform
- **Internal technology** includes technology used internally by staff: staff computers, mobile phones and other equipment, the CRM and associated platforms (for accounting, payments, direct debits, security checks, marketing/communications, surveys, etc), internal data security, staff equipment.

The strategy should include regular monitoring of existing technology platforms, including their appropriateness, value for money, relevance and security, and (where appropriate) appraisal of alternative platforms.

The strategy should also include consideration of the resources required to maintain such technology, such as training, ongoing support and advice/expertise, hosting, software maintenance, etc.

Investment in technology should be an expected and regular financial outgoing of the association, not a 'set and forget'. Technology becomes outdated very quickly, and as such requires constant updates and maintenance. In addition, customer expectations are high in terms of service and functionality, and our members will expect us to keep pace.

Staff should have access to the appropriate and relevant technology required to carry out their jobs. Administrative staff should be trained on and familiar with all platforms used within the association, so that services aren't interrupted due to staff absence.

STRATEGY: Finance

A strategy which assesses current resources, costs and budget and aligns them with the mission and objectives of the association.

The finance strategy should include:

- setting budgets against various activities and overheads, whether annually or on a project-basis
- a process for monitoring spends within the budgets and adjusting where necessary
- regular reviews to ensure minimising unnecessary outgoings
- identifying opportunities for external funding
- reviewing membership subscription fees
- reviewing the cost of inclusive member benefits against the annual fee charged
- reviewing event ticket costs

The financial implications of any new activities or projects should be considered, including costs of equipment, technology and human resources. These costs should be considered against the projected regular outgoings, costs of ongoing projects and available funds.

STRATEGY: Governance

A strategy which ensures that the governance of the association is robust, transparent, inclusive and agile.

The governance strategy includes:

- Regular review of Articles of Association to ensure they are fit for purpose, and adjusting where necessary
- Regular review of governance structure to ensure it is fit for purpose, and adjusting where necessary
- Regular risk monitoring and proactive risk management
- Regular financial reporting
- Regular monitoring of changes to company law and regulations, and implementing where appropriate
- Accurate and available documentation of processes, policies and decision making
- Cultivating a culture of transparency, openness and willingness to share information internally within the organisation, and externally to members.