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CBBS STRATEGIC PLAN

I - Education

Strategic goal: To provide unbiased educational programs that meet the needs of physicians, other healthcare professionals and students involved in blood banking and transfusion medicine.

Strategy/Tactic	Description
Strategy 1	Identify target audiences and educational needs.
tactic 1.1	Periodically survey potential target audiences, identify appropriate educational formats.
tactic 1.2	Use seminar, CBS, and AM evaluations as a needs assessments tool.
Strategy 2	Develop programs in current and interesting formats to meet identified educational needs.
tactic 2.1	Charge all planning committees to develop suggestions for new formats for programs.
tactic 2.2	Identify new formats, technology and approaches for education through the Ad Hoc Technology committee.
tactic 2.3	Evaluate delivery mechanisms and program formats. Discuss with web committee.
Strategy 3	Promote Programs
tactic 3.1	Develop promotional strategies based on the needs assessment
tactic 3.2	Regularly evaluate methods of program promotion (electronic vs. hard-copy mailings & use of website).
Strategy 4	Evaluate Programs
tactic 4.1	Encourage participants to complete an evaluation for each program.
tactic 4.2	Post evaluations on CBBS website committee area for committee chairs, CE Committee, and Board of Directors to review within four weeks and use this information to plan future programs and products
tactic 4.3	Evaluate the program evaluation forms to ensure they are an effective tool for continuous improvement of programs

* Refer to Strategic Plan Action List

Created September 2006. Updated yearly by the CBBS Board of Directors. Last update September 2012.

Michael Hayward,
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CBBS STRATEGIC PLAN

II - FINANCIAL

Strategic Goal: Maintain the financial viability of CBBS

Strategy/Tactic	Description
Strategy 1	Maintain at least one year's operating reserves
tactic 1.1	Finance committee review financial statements on a regular basis and report to the Board.
tactic 1.2	Annual review and preparation of taxes by a certified accounting firm with review by the Finance Committee and Board.
tactic 1.3	Full financial audit by a certified accounting firm every 5 years or at the discretion of the finance committee and the Board.
Strategy 2	Obtain funds for continued operation of the website
tactic 2.1	Identify and approach potential sponsors.
tactic 2.2	Develop proposals for retaining existing website sponsors.
tactic 2.3	Develop goals and evaluate relevant operating expenses and revenue associated with website operation.
Strategy 3	Determine if a CBBS service or program is financially viable and meets our mission
tactic 3.1	Evaluate services and programs that do not pay for themselves as to whether or not they are central to the mission of CBBS.

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CBBS STRATEGIC PLAN

III - MEMBERSHIP

Strategic Goal: Continually seek an increasing and professionally diverse membership base.

Strategy/Tactic	Description
Strategy 1	Increase Individual Membership
tactic 1.1	Develop proposals for recruiting new individual members, including a focus on professionals new to the field of Transfusion Medicine / Blood Banking. Develop/revise brochure.
tactic 1.2	Develop proposals for recapturing lapsed members.
tactic 1.3	Develop marketing proposals for retaining existing members.
tactic 1.4	Develop an annual goal for the next three years.
Strategy 2	Increase Institutional Membership
tactic 2.1	Develop proposals for attracting new institutional members.
tactic 2.2	Identify appropriate contact people and decision-makers at each institution.
tactic 2.3	Develop a plan for maintaining relationships with existing institutional members and ensuring continued membership.
tactic 2.4	Develop goals and budgetary considerations

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IV - FOUNDATION

Strategic Goal: Oversee the growth and self-sustainability of the Educational Fund managed by the Humboldt Area Foundation

Strategy/Tactic	Description
Strategy 1	Oversight responsibility resides with the finance committee
tactic 1.1	Annually directly contact a representative of the Humboldt area Foundation for a verbal update and review of the investment strategy for the educational fund.
tactic 1.2	Review the Humboldt Area Foundation annual reports
tactic 1.3	Finance committee reports findings to the Board for review and approval.
Strategy 2	Create a donation plan to grow the educational fund
tactic 2.1	Solicit donations from CBBS Board, Membership, Vendors, and other parties as identified by the Board.
Strategy 3	Encourage use of the fund
tactic 3.1	Increase awareness to the membership and other health care professionals

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Strategic Goal: Develop dedicated, capable volunteer leaders within the organization and maintain Bylaws that are current and reflect the vision and needs of the organization.

Strategy/Tactic	Description
Strategy 1	Develop leaders within the organization
tactic 1.1	Encourage membership to become involved by serving on committees
tactic 1.2	Utilize mentoring relationships to develop leaders within the committees
tactic 1.3	Identify and develop outstanding leaders to elevate to committee ship, chairmanship, and/or the board of directors
Strategy 2	Evaluate the Effectiveness of the Board
tactic 2.1	Implement a Board recruitment plan to select nominees for the vacancies on the Board, with due regard to maintenance of vocational and geographical balance
tactic 2.2	Assign a mentor to new Board members
tactic 2.3	Develop Board / committee self-evaluation which measures their successful achievement of expectations
tactic 2.4	Provide Board with summary of feedback from Past President's event
Strategy 3	Review, Revise and Approve Bylaws Annually
tactic 3.1	Annual review of bylaws as deemed necessary by the Board of Directors
tactic 3.2	Assess the need to update the bylaws based on membership feedback and organizational vision
tactic 3.3	Continual evaluation of committees to ensure they meet the needs of the organization.
tactic 3.4	Compare Board Policies against bylaws annually or as deemed necessary by the Board of Directors

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