



STRATEGIC PLAN 2017 – 2020



INTERNATIONAL SOCIETY FOR BIOLOGICAL
AND ENVIRONMENTAL REPOSITORIES

Contents

Executive Summary	4
Context	5
Strategic Planning Process	5
Environmental Scan Summary	5
Interviews	6
Leadership Feedback	7
Membership Survey	7
SWOT Analysis	8
Table 1: Strengths, Weaknesses, Opportunities, Threats	8
Table 2: SWOT Strategies Matrix	11
Strategic Planning Results	12
Mission.....	12
Vision	12
Society Goals	12
Strategic Directions	13
Organization Structure.....	14
Organizational Chart	15
Strategic Plan Evaluation and Monitoring	16
Strategic Plan Dissemination	16
Appendix 1: Strategic Action Plan	17
Appendix 2: Summary of Interviews	26
Appendix 3: Committee Questions	30
Appendix 4: Executive Summary of Members Survey	30
Appendix 5: Works Cited	31

“Strategic Planning is about listening to ‘the better angels of our nature,’ as Abraham Lincoln called them in his First Inaugural—it is about organizing our best and most noble hopes, dreams and making them reasonable and actionable and bringing them to life.”

– John M. Bryson



Executive Summary

J.M. Bryson defines strategic planning as “the deliberative, disciplined approach to producing fundamental decisions and actions that shape and guide what an organization is, what it does and why” (Bryson 7). The goal of strategic planning is to clarify the Board of Directors (BOD)’s vision, expectations of staff, volunteers and partners. The end result of the process is to have clearly outlined directions, strategies, actions that are measurable and that will facilitate reaching the society’s mission and vision.

At the February 2016 International Society for Biological and Environmental Repositories (ISBER)’s BOD meeting, the BOD agreed to undertake strategic planning for 2017 to 2020 in conjunction with the association’s first regional meeting. The BOD tasked its Executive Director, Ana Torres, to lead the strategic planning process.

In order to ensure that the ISBER’s strategic plan was based on the needs of its membership and its stakeholders an environmental scanning process was initiated. The process included a member’s survey, stakeholder interviews and leadership input and feedback via committee members and chairs.

A membership survey was designed and approved by the BOD and Committee Chairs. The survey was disseminated from April 6 to May 31, 2016. The survey was broadly advertised to the membership via email, forum, and at the annual meeting. 276 members completed the survey, which represents 22.8 % of the association’s 2016 membership. The results of the survey can be accessed in Appendix 4. The results of the survey were reviewed by the BOD and Committee Chairs as part of the strategic planning process.

In consultation with the BOD and Committee Chairs, a list of various sector stakeholders and questions were developed. Then stakeholder interviews were conducted from June 1 to August 31, 2016. A total of 14 interviews were conducted. Interviews were classified as either “partner” or “corporate partners”: Partners are associations with whom ISBER has an existing associate or affiliate agreements. Corporate Partners are industry companies that sponsor the association. The BOD and committee chairs identified which partners and corporate partners would be interviewed. Eight partners were interviewed; six corporate partners were interviewed. A summary of the interviews is available in Appendix 2.

As part of the process input and feedback from the association’s leaders was sought via the Committee Chairs. Committee Chairs were tasked with seeking input and feedback from its members. A set of questions were developed and the chairs reported the members feedback at the strategic planning session held in conjunction with the association’s Bethesda Regional Meeting.

Strategic planning sessions were organized with the BOD and Committee Chairs on Saturday, November 5 and Sunday, November 6, 2016 in Bethesda, Maryland, USA.

Context

The previous strategic plan was created in 2013 when the association became its own entity. Much of the focus of the last strategic plan was to set up the organization's infrastructure in order to ensure that the association was positioned to meet its newly identified mission and vision.

That plan had the following key strategic directions:

1. Establish ISBER as an integrated global society
2. Balance growth and financial sustainability of the society
3. Optimize organization efficiencies
4. Identify and develop future leaders
5. Sustain market leadership position in biobanking

The Board of Directors and Committees Chairs were successful in achieving many of the key initiatives.

The last plan was focused on building infrastructure, because the organization was so new with few reserves. The new plan will build on the achievements of the 2013-2016 strategic plan by leveraging some of its assets to increase market share and influence. The new plan will be ambitious with stretch goals. Measurable goals and milestones are included in the action plan.

Strategic Planning Process

ENVIRONMENTAL SCAN SUMMARY

Non-profit organizations must understand the external and internal environment within which they find themselves so that they can develop effective strategies. The purpose of an environmental scan is to evaluate potential significant environmental trends and changes facing the industry and association. An environmental scan provides a snapshot of the position of the organization for consideration and evaluation.

ISBER's environmental scan included stakeholder interviews, feedback from its leaders via the Committee Chairs and a member survey. The information gathered from this scan was synthesized by the BOD and Committee Chairs into a Strengths, Weaknesses, Opportunities, Threat (SWOT) analysis. Then SWOT was analysed to develop strategic directions, objectives, key initiatives and tactics.

INTERVIEWS

A total of fourteen interviews were conducted by the association Executive Director with assistance from the Association Coordinator throughout the summer of 2016. Interviews lasted between thirty minutes to one hour depending on the feedback provided. Please see Appendix 2 for a summary of interviews. The interviews were divided into two types: external partners (8 interviews) and internal corporate members (6 interviews).

The interviewees were asked to respond to the following questions:

1. What are key trends that you can identify in biobanking that will impact you or your organization in the next three to five years? This may include legislative, regulatory, practice driven, social, technological, etc.
2. What should ISBER's top three priorities be to support the biobanking field in the next three to five years?
 - a. What are actual or potential opportunities you can identify to advance these priorities?
 - b. What are actual or potential barriers you can identify that would limit advancement of these priorities?
3. What could ISBER do tomorrow to improve the field of biobanking?
4. What can ISBER do to be more useful to your organization?
5. Do you have any ideas for collaborating with ISBER on a new project or initiative? What would you hope to achieve?
6. Are there any biobanks that ISBER should reach out to?
7. Should ISBER partner with any new organizations? If so, which?
8. Do you have any other comments?

Key trends that will influence ISBER in the next few years were identified. These include:

1. A move towards standardization, precision medicine, quality, sustainability
2. A need for long-term planning for biobanks
3. A need to make connections between environmental and human biobank
4. Changing legislation and the implications of the Nagoya protocol
5. Increase in diagnostics developments
6. Collaboration between academic and institutional biobanks
7. New technologies
8. Increase in data related to samples
9. Economics of biobanking
10. Integration with hardware and automation
11. Sample sharing
12. Ethical, Legal and Social Issues (ELSI)
13. Finally, continued industry growth, particularly in markets, such as India and China

The content gathered in these interviews was presented at the BOD and Committee Chairs strategic planning session. This information informed the SWOT analysis.

LEADERSHIP FEEDBACK

ISBER knows that one of its key strengths is its volunteers and volunteer leadership. To ensure that we captured the input of our leaders, Committee Chairs were asked to solicit input from their members. See the questions discussed in Appendix 3.

The content gathered by the Committee Chairs was presented at the BOD and Committee Chairs strategic planning session. This information informed the SWOT analysis.

MEMBERSHIP SURVEY

The first ever membership survey was conducted from April 6 to May 31, 2016. A total of 276 respondents participated in the survey (n=1209). This represents 22.8% of the 2016 membership. It is worth noting that not all respondents completed the survey and that not all questions were mandatory so there was a variance in the response rate per question. Survey monkey technology was used. See appendix four for the survey results.

Once again the content gathered was presented at the BOD and Committee Chairs strategic planning session.

Members noted that ISBER should have an advocacy role on ELSI issues, quality management, regulatory issues, best practices, standardization, sustainability and public engagement. Furthermore, they identified the biggest challenges coming up for the biobanking industry in the next five to ten years to be Finance/Sustainability, Regulation, Consent/ELSI, Standards, and Global Harmonization. 80% of those surveyed indicated that ISBER should have a role in developing position statements on key issues in biobanking on the topics of regulation, ethics, sustainability, quality, accreditation and the Nagoya protocol.

SWOT ANALYSIS

The purpose of SWOT is to provide the organization with information regarding its strengths and weaknesses in relation to the opportunities and threats it faces. The SWOT below was created by the BOD and Committee Chairs and was based on the membership survey, leadership feedback and stakeholder interviews. The SWOT below has been organized according to five new proposed strategic directions:

1. Strengthen Organization
2. Policy Influence
3. Advance the Science of Biobanking
4. Global and Sectoral Presence
5. Increased Awareness of ISBER

These categories are further defined on page 14.

TABLE 1: STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS

STRENGTHS (INTERNAL)	WEAKNESSES (INTERNAL)
<p>Strengthen our Organization</p> <ul style="list-style-type: none"> • Volunteers • Reputation • BIO Journal • Management structure • Products and tools • Annual meeting • Vendor relations • Organization relationships • Diversity of biobanks covered • Community driven • Relative financial stability 	<p>Strengthen our Organization</p> <ul style="list-style-type: none"> • Decreasing organizational membership • Old boys/girls network • Communications (internal and external) • Membership and conference are expensive • Volunteers lack time • Not enough young members and leadership • Lack of a strong mentoring program • Membership categories don't encompass "a wide net of researchers" • Lack of succession plan for committee leadership

TABLE 1: STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS

STRENGTHS (INTERNAL)	WEAKNESSES (INTERNAL)
<p>Policy Influence</p> <ul style="list-style-type: none"> • ISBER Best Practices • Access to expertise/forum • Educational materials • Educational focus • Strong science policy committee and leadership <p>Advance the Science of Biobanking</p> <ul style="list-style-type: none"> • Biospecimen Science Working Group • ISBER Best Practices • Annual and Regional Meeting focus on biospecimen science <p>Global and Sectoral Presence</p> <ul style="list-style-type: none"> • Global Reach • Networking <p>Increased Awareness of ISBER</p> <ul style="list-style-type: none"> • None Identified 	<ul style="list-style-type: none"> • Lack of administrative support for working group and special interest groups • Shortage of members and lack of engagement in certain sectors • Member database is hard to access • Too much bureaucracy (i.e., renewing membership, “volunteering” for BP or other positions) • Lack of connection for SIGS & Working Groups • Lack of subscription/membership • ISBER Website needs work* • More visibility and transparency* • BOD seems aloof, remove any barriers* • Lack of Knowledge of Experts • Lack of evaluation plan • Lack of establishment of metrics <p>Policy Influence</p> <ul style="list-style-type: none"> • Lack of subject matter experts on certain policy issues like EB <p>Advance the Science of Biobanking</p> <ul style="list-style-type: none"> • None identified <p>Global and Sectoral Presence</p> <ul style="list-style-type: none"> • Too US centric • Too human biobank focused • May be spread too thin (regionally speaking) • Affiliations are weak • Narrowness of scope <p>Increased Awareness of ISBER</p> <ul style="list-style-type: none"> • Lack of strong marketing plan • Lack of internal and external communications plan • Not enough marketing of tools and resources

* Stakeholder Interviews

TABLE 1: STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS

OPPORTUNITIES (EXTERNAL)	THREATS (EXTERNAL)
<p>Strengthen our Organization</p> <ul style="list-style-type: none"> • Attract and engage new members to society • Attract and engage new leadership to the BOD • Financial stability provides opportunities • Develop webinars & workshops for non- and prospective members • Address information sharing* • Drive membership increase* <p>Policy Influence</p> <ul style="list-style-type: none"> • Increase in attention around precision medicine • Advocate and influence policy • Access more information • Educating policy makers • Lead discussions about quality* • ISBER’s presence on policy needs to be stronger* • Respond to the changing industry* • Lead in advocacy and external communications* <p>Advance the Science of Biobanking</p> <ul style="list-style-type: none"> • Accreditation and certification • Enhanced quality parameters • Education in general • Education opportunities for biobanking (e.g., Masters and PhD) • Lead education and training (via qualifications, standards, etc.)* • Lead in new technologies* • Advance the science of biobanking* • Host consensus conferences* • Lead standardization and best practices* • Strengthen the Special Interest Groups* • Drive innovation in biobanking and bioprocessing* • Provide research grants* 	<p>Strengthen our Organization</p> <ul style="list-style-type: none"> • Researchers who don’t identify as biobankers • Financial risk of regional meetings • Funding cuts for biobanks & related services/ industry • Proliferation of competing biobanking meetings • Other organization threats to financial stability (e.g., regional meetings where we don’t have full financial control) • Relationship with vendors • Institutional/corporate understanding of ISBER, and lack of support for ISBER engagement and participation • Misunderstanding of ISBER <p>Policy Influence</p> <ul style="list-style-type: none"> • Policy change • Regulations change • No complete knowledge of biobanking • Changing legislation • Scandals and bad press • Progress in Biorepository Science is swift • Funding Instability for biorepository science • Funding* • Politics* • Legislation* • Brexit* <p>Advance the Science of Biobanking</p> <ul style="list-style-type: none"> • Biobanking is not a formal discipline • Lack of evidence based data regarding biorepository standards to develop standards • Lack of SOPs in industry*

* Stakeholder Interviews

TABLE 1: STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS

OPPORTUNITIES (EXTERNAL)	THREATS (EXTERNAL)
<p>Global and Sectoral Presence</p> <ul style="list-style-type: none"> • Global engagement & enhanced relations around the globe • Hefei & Stockholm Meetings • Affiliation engagements and partnerships • Expand long standing relations • Lower/Middle Income Country focus • Pacific Rim Asia • South & Central American networks such as National Cancer Institutions of Latin America • Expansion into pharma market • Lead interactions and influence in Asia Pacific* • Develop a global outreach program* • Increase pharma engagement* • Provide more regional training* • Offer more online resources, e.g. webinars* <p>Increased Awareness of ISBER</p> <ul style="list-style-type: none"> • Market education initiative • Market products & services • Improve web footprint • Opportunities for public education 	<p>Global and Sectoral Presence</p> <ul style="list-style-type: none"> • Regional Meetings • Regional Differences in Practice* • Need to reach Middle-Eastern biobanks*

* Stakeholder Interviews

Then SWOT was analyzed in order to develop strategies via the SWOT Strategies Matrix, Table 2.

TABLE 2: SWOT STRATEGIES MATRIX

	OPPORTUNITIES (EXTERNAL, POSITIVE)	THREATS (EXTERNAL, NEGATIVE)
Strengths (internal, positive)	Strength-Opportunity Strategies Which of ISBER’s strengths can be used to maximize the opportunities you identified?	Strength-Threat Strategies How can you use ISBER’s strengths to minimize the threats you identified?
Weaknesses (internal, negative)	Weakness-Opportunity Strategies What actions can you take to minimize ISBER’s weaknesses using the opportunities you identified	Weakness-Threat strategies How can you minimize the ISBER’s weaknesses to avoid the threats you identified?

The results of this analysis can be seen in Appendix 1: Strategic Action Plan.

Strategic Planning Results

The BOD and Committee Chairs reviewed the mission and vision and revised as follows:



ISBER is a global biobanking organization which creates opportunities for networking, education, and innovations and harmonizes approaches to evolving challenges in biological and environmental repositories.



ISBER will be the leading global biobanking forum for promoting harmonized high quality standards, education, ethical principles, and innovation in the science and management of biorepositories.



-
1. Disseminate information on repository management issues
 2. Educate and share information and tools within the society and with stakeholders
 3. Act as the voice for repositories to influence regulations and policy
 4. Develop best practice guidelines
 5. Provide centralized information about existing repositories
 6. Bring members together to work on emerging issues
-

Strategic Directions

Once the mission, vision, and goals were confirmed and the SWOT completed the strategic directions became evident:



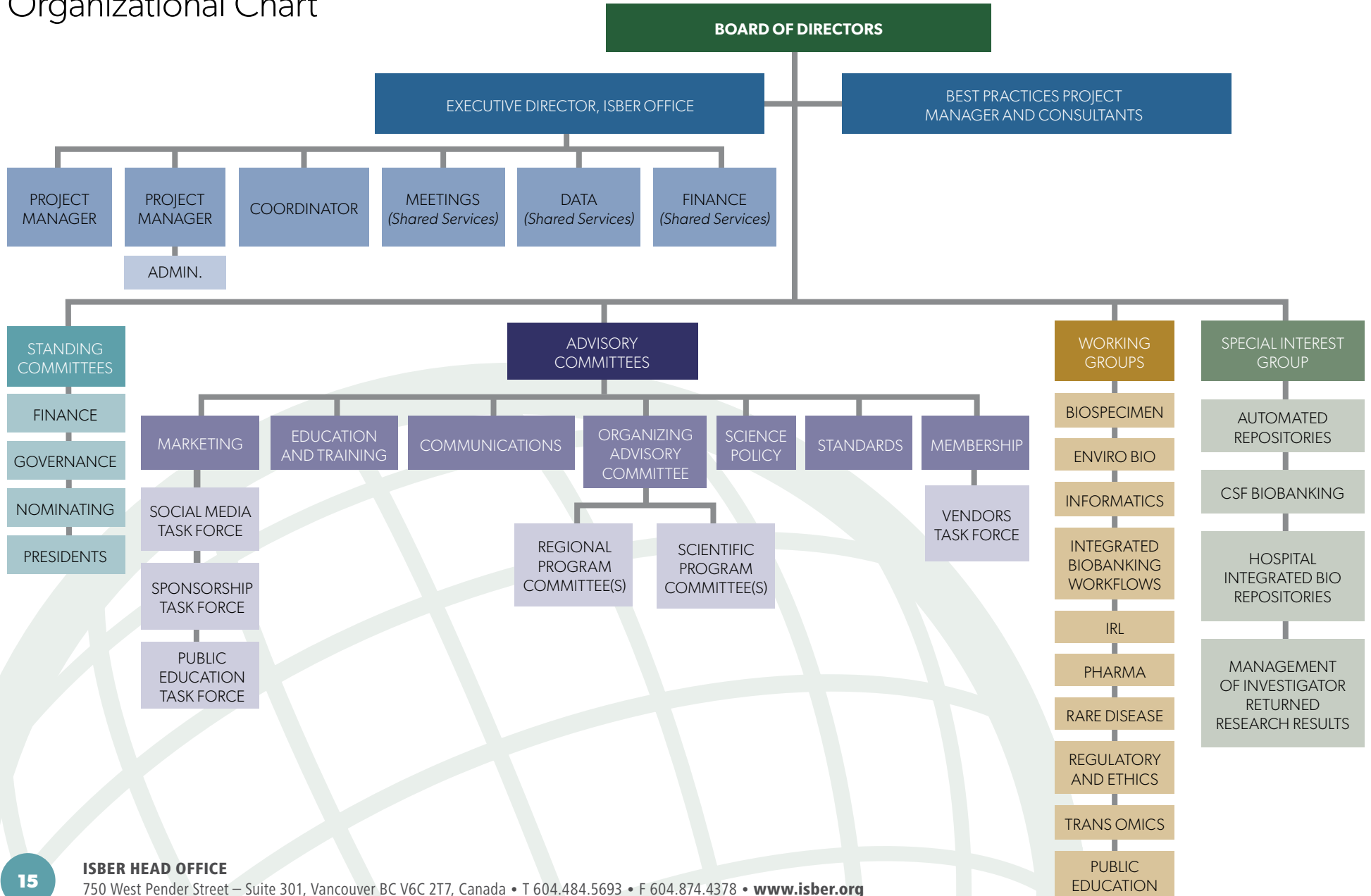
ORGANIZATION STRUCTURE

In order to ensure that the organization can achieve its strategic directions, we reviewed the organizational structure and agreed to change as follows:

- Split the Membership and Marketing Committee into two distinct committees with more focused mandates; the Membership Committee will be responsible for: member communications, volunteer management, member survey, membership drive, annual review of membership statistics; the Marketing Committee will be responsible for marketing the association and its tools and services externally.
- The Scientific Program committee will cease to be a committee reporting to the BOD. Instead it will report to the Organizing Advisory Committee, which reports to the BOD.
- The Publications Committee will be dissolved. A Communications Committee will be created that will contain representation from all advisory committees. The communications committee terms of reference are to be determined.
- A Standards Committee will be created. Any standards, certification and best practices activities which were previously led by the Education and Training Committee will now be led by this new group.

The changes are reflected in the Updated Organizational Chart detailed on page 16.

Organizational Chart



STRATEGIC PLAN EVALUATION AND MONITORING

The ISBER Strategic Plan will be evaluated and monitored in the same manner as the previous plan. The BOD and Committee Chairs will review the strategic action plan in detail at their in person meetings in the spring and fall of each year.

STRATEGIC PLAN DISSEMINATION

The ISBER Strategic Plan will be disseminated broadly to its membership and beyond using all electronic communications vehicles (website, social media, forum, etc.). Committee Chairs will be tasked with reviewing the strategic plan and strategic action plan this upcoming spring. BOD members will arrange for meetings with the working groups and special interests groups to ensure engagement from these key members. Partners who provided input into the strategic planning process will receive copies of the strategic plan.

Appendix 1: Strategic Action Plan

INTRODUCTION

Once the strategic action plan is approved the action items will be delegated to committees. Each committee will explore the feasibility of the objectives, initiatives and timelines; the committee chairs will provide feedback on feasibility, etc. on a biannual basis. It is understood that through the implementation of the strategic action plan changes in how committees operate and collaborate may result. We will track such changes and integrate into our policies and procedures.

STRATEGIC ACTION PLAN

Strategic Direction: Strengthen Organization

Objective	Initiative	Timeline	Measurables and Metrics	Responsible Party
Ensure a strong finance and Infrastructure	Diversify Funding base	2020	Create a new revenue source by the end of the strategic plan	Finance, BOD
	In years 2017, 2018 and 2019, allocate a minimum of 25% of year end profits to build an internally restricted fund of \$100K to support strategic initiatives— e.g., white papers	Annual	Achieve a \$100K fund by the end of 2019	Finance, BOD
	Explore and leverage resources in the IRL; examine partnering with other organizations and directories	December 2018	Formal agreement	BOD
Strengthen Governance	Roll out committee changes to Communication and Membership and Marketing Committees	May 2017	Terms of Reference approved and publicized at the 2017 conference	Governance, BOD, Membership, Marketing, Communications
	Refine succession planning strategy by developing “time outs” for leadership roles within the association to allow room for new leadership	June 2018	Policy and Bylaws to be updated	Governance, BOD
	Create consultant and advisory roles to maintain institutional history	December 2017	Advisory roles integrated into policy	Governance, BOD

Strategic Direction:
Strengthen Organization

Objective	Initiative	Timeline	Measurables and Metrics	Responsible Party
Strengthen Governance	Create specific succession plans for all committees chairs and BOD	June 2018	Succession Plans for each committee approved by the BOD	OAC, Governance
Pricing Model for ISBER Meetings	Examine whether we are more expensive than other comparable meetings • Compare national vs. international fees	June 2017	New pricing structure for the conference approved by the BOD and implemented for 2018	OAC, Membership
Develop and Mentor New Leaders	Develop emerging and young leader's award program to be awarded at the conference	December 2018	Emerging Leaders Program presented to members by December 2018	Membership, Nominating
Ensure geographic diversity in the awards program	Ensure that awards are not always given to North Americans	December 2017 and ongoing	Awards winners to be from geographic diverse areas	Nominating, governance
Strengthen Volunteer Recognition	Enhance and publicize current volunteer recognition program with a goal to increase volunteers and encourage volunteering	December 2018	Volunteer recognition program to be presented by December 2018	Membership, Communications
Membership Structure that Meets the Needs of the Biobanking Community	Develop new membership pricing structure with financial implication review: • Explore LMIC/BCNET free membership • Examine pricing/category & sector, profit vs non-profit • Examine Trial membership period • Create a special category for ELSI professionals interested in biobanking • Create joint membership with relevant organizations • Examine (90 days); Include free online access to journal for 60 days • Examine joint membership with PRM&R	September 2018	Membership re-structuring to be presented be ready to be rolled out by September 2018	Membership, Marketing

Strategic Direction:
Strengthen Organization

Objective	Initiative	Timeline	Measurables and Metrics	Responsible Party
Foster Enhanced Vendor Relations	<p>Revise corporate sponsorship and meeting sponsorship opportunities guide. Examine the feasibility of:</p> <ul style="list-style-type: none"> • More flexible sponsorship & meeting (e.g., more of a “menu”) • Allocating “credits” for partners to select their services & opportunities • Provide more opportunities to present via educational grants • More opportunities to meet with BOD • Improve exhibit hall arrangement • Mentoring in exhibit hall/roundtables • Poster prize in exhibit hall • Sessions at exhibit hall 	June 2017	Revised corporate sponsorship and meeting sponsorship to be rolled out for December 2018	Membership, Marketing, OAC
Engage Vendors in Association	<p>Develop a strategy for ensuring vendor participating in ISBER activities:</p> <ul style="list-style-type: none"> • Include vendor members in committees if this is what vendors wish; • Create an R+D forum for vendors and members • Ensure vendor participation in association activities and events 	December 2019	Ensure strategy is integrated into association policies and governing documents	Membership, Governance
Examine the Structure of Regional Meetings and/or workshops	<ul style="list-style-type: none"> • Create a vision for regional meetings structure that would encompass different models used—e.g. Bethesda, Hefei, GBW, biospecimen meeting, basic training. Plan 3 years in advance. Consider whether regional meeting should be more focused on practical and educational workshops • Review financial structure for regional meetings; budget regional meetings at least a year in advance • Develop regional meeting objectives for each region (Examine partnering with local organizers as opposed to having the program be OAC led) • Structure the OAC so that the regional meetings are led by Vice Chairs thereby representing the OAC on regional meeting committee conferences • Evaluate involvement in regional meetings for example, GBW. Some of the criteria to evaluate could include: Revenue to cover travel; Vendor feedback; Profile; How often will GBW be held?; How to measure success? (Financial, Educational); Ease of process; Effort required by ISBER; Does ISBER profit; Does ISBER increase visibility in Europe? 	May 2018	Regional Meeting plan to be developed and approved by the BOD	OAC

Strategic Direction:

Policy Influence

Objective	Initiative	Timeline	Measurables and Metrics	Responsible Party
Explore positioning ISBER as policy leader to public globally	Create a public education campaign to increase public, member and policy makers' awareness on biobanking and related policy matters; collaborate on this initiative with the public education working group	June 2017	Successfully executed PR campaign with KPIs	Science Policy, Communications, Marketing, Public Education Working Group
Create a policy engagement plan	<ul style="list-style-type: none"> Identify areas of policy influence Examine sphere of influence Determine ISBER experts on key areas of policy, regulation and legislation 	December 2017	BOD approved Policy engagement plan	Science Policy, BOD, Marketing
Incorporate policy component to ISBER products and services	<ul style="list-style-type: none"> Explore the idea of holding a Public Forum in conjunction with the annual conference on key issues of policy Science Policy column in BIO that would address issues related to policy, regulation, and legislation related to biobanking Create roundtables on key policy issues for networking at the conference Leverage working groups and special interest groups to support policy development, analysis and influence Continue w/position statements/policy statements Communications campaign around policy & position statements 	December 2019	Conduct an annual review of ISBER services and education activities to ensure that there is engagement around policy matters	Science Policy, Communications
Advocate on behalf of biobanking to advance biobanking	<ul style="list-style-type: none"> Meet/connect with funding agencies to educate them about biobanking and advocate for funding. Ensure that advocacy work does not affect our 501c3 status Engage policy makers as needed 	December 2019	Successful meetings with funding and policy makers that result in ISBER influencing policy	Science Policy, Communications, Marketing
Create a process for addressing regional specific policy	Address regional specific policy	December 2018	BOD approval on regional policy engagement process	Science Policy
Position ISBER as a leader in educating its members around policy development	Educate members about issues around policy development, analysis and influence	May 2018	Launch a policy education campaign at the 2018 conference	Science Policy, E+T, Membership, OAC

Strategic Direction:

Advance the Science of Biobanking

Objective	Initiative	Timeline	Metric	Responsible Party
Support the speedy development of Best Practices and disseminate globally	<ul style="list-style-type: none"> • Translate ISBER Best Practices to relevant languages; determine relevant languages • Link Best Practices to ISO • Ensure that CEN (European Committee for Standardization) is encompassed within Best Practices • Best Practices marketing plan to be completed and executed fall of 2017 by the marketing committee • Work towards evidence based tools 	December 2017	Fully disseminated best practices	Standards, Marketing
Become a clearing house for Tools, SOPs and “how to’s”	<ul style="list-style-type: none"> • Provide links to practical how to’s (e.g. tracking consent) • Create a template for SOPs and post on the website 	December 2019	New section of the website for tools and SOPs	E+T, Marketing
Develop and market exam about biobanking with certificate	<ul style="list-style-type: none"> • Collaborate with ASCP to develop a qualification for biobanking technicians 	June 2018	TBD with ASCP (i.e. have 5% of membership take course in year 1 with a 10% increase each year)	Standards, Marketing
Market and Promote ISBER/CTRNET Introduction to Biobanking	<ul style="list-style-type: none"> • Create a marketing and promotions plan for the Introduction to Biobanking Course 	December 2018	Increased participation in the course Expansion into new markets	E+T, Marketing, Communications

Strategic Direction:

Global and Sectoral Presence

Objective	Initiative	Timeline	Measurables and Metrics	Responsible Party
Increase ISBER's Reach in the Regions	Create an LMIC engagement plan (incorporate collaborating with BCNET and AORTIC) Examine developing a task force to develop the LMIC engagement plan; if a task force is reasonable, then proceed with making this party responsible for this activity	December 2017	LMIC engagement plan approved by the BOD	Marketing
	Webcast key sessions of conference	May 2017	Produce and disseminate one webcast at the ISBER annual meeting	Marketing, E+T, OAC
	Create a list of regional meetings that ISBER can partner with—i.e. present content	June 2018	Prioritized list of potential partners approved by the BOD	Marketing
	Ensure online tools are marketed to the regions	Spring 2017	Regional Marketing plan for each of the tools	Marketing
	Ensure that each ISBER Educational Material has a regional component/regional access plan	February 2018		E+T, Marketing
	Create online and in-person networking opportunities (including mentorship)	Spring 2017 test; launch Spring 2018	One new online opportunity; one new in person opportunity	Marketing, OAC
	Present ISBER Best Practices in regions	December 2018, 2019	Present in at least one new region in 2018 and 2019	Marketing, E+T
Online/new technologies	Increase the amount of travel grants; create a structure for partial and full grants; ensure that structure differentiates between L & MIC	May 2018	Created and executed new travel grant program	Marketing, OAC, Membership
	Engage with marketing committee task forces to ensure that we are developing marketing materials using newer technologies and medium such as video, YouTube	December 2017	Report from social media task force on how best to engage with newer technologies to market initiatives	Marketing, Social Media task force, E+T, Science Policy, OAC, Communications
	Explore the establishment of an ISBER YouTube Channel that would host webinars, webcasts, video promotional materials	September 2017	ISBER YouTube Channel Launched September 2017	Marketing, social media task force

Strategic Direction:

Global and Sectoral Presence

Objective	Initiative	Timeline	Measurables and Metrics	Responsible Party
Strengthen and Enhance Partnerships	Improve relations with key organizations; Create competitive analysis of key organizations	Immediate—Ongoing	Competitive analysis submitted to the BOD	BOD, Presidents, Marketing
	Review agreements template and strengthen, focus agreement in cross marketing and take advantage of reciprocities by: 1. Taking full advantage of our current agreements 2. Establishing formal member liaisons with our partners to make sure there is follow through to take full advantage of the reciprocities in these agreements Create a staggered timeline for when the agreements will be examined	December 2017	New agreements template	Presidents
	Establish a list of potential partners and approach	June 2017	List of potential partners	Marketing, Membership
	Find areas of common interest with five key partners and develop/propose project	December 2017	Five new projects proposed	BOD
	Do membership drives with partner organizations where feasible and appropriate; look at organizational membership drives	December 2017	One new membership drive in each of 2017, 2018 and 2019	Membership
	Present about ISBER at relevant meetings	Ongoing	Minimum one new presentation each year	E+T, Science Policy, Presidents, OAC
Create a plan for reaching areas where ISBER is under-represented	Develop an expansion plan partnership in Eastern Europe, Africa, China, South America and Asia	December 2018	Execute expansion initiatives in 2018 and 2019	Marketing

Strategic Direction:

Global and Sectoral Presence

Objective	Initiative	Timeline	Measurables and Metrics	Responsible Party
Sectoral Outreach	Develop Enviro-bio specific education	December 2019	One new education initiative for Enviro-bio	E+T
	Develop Enviro-bio specific marketing and PR campaign	December 2018	Executed Enviro-bio marketing and PR campaign	Marketing
	Create marketing & education plan for different sectors including IRB and Patient Outreach; determine the sectors for which we need marketing plans	June 2018	Plan approved by the BOD	E+T, Marketing, Science Policy, working groups
	Examine creating sector columns in BIO—e.g. a pharma column	June 2017	New column published	Communications

Strategic Direction:

Increased Awareness of ISBER

Objective	Initiative	Timeline	Measurables and Metrics	Responsible Party
Increase the impact of ISBER's products and services	Create a new advertising and marketing plan for the conference, Best Practices online course and regional meetings <ul style="list-style-type: none"> • Session objective for conference & symposia & sessions • Create tracks at the conference and workshops 	December 2017	10% increase in attendance from previous year at the 2018 meeting	Marketing, OAC, Standards
	Create a marketing plan for ISBER Tools and Resources, individually and collectively <ul style="list-style-type: none"> • Market these in LMIC's and other sectors including other regions 	June 2017	10% annual increase in website usage of tools and resources	Marketing

Strategic Direction:

Increased Awareness of ISBER

Objective	Initiative	Timeline	Measurables and Metrics	Responsible Party
Increase the impact of ISBER's products and services	Optimize the website by bringing in consultant	June 2017	Survey the membership around the effectiveness of the website; have higher rating post website optimization	Marketing, Social Media, Communications
	Create an ISBER marketing plan <ul style="list-style-type: none"> • Ensure social media is key component of plan • Ensure that marketing campaign is targeted to different audiences 	May 2017	A BOD approved marketing plan with KPIs	Marketing
	Create a biobanker education campaign—Campaign for researcher and others interested who may not be	December 2019	Fully executed biobanker education campaign	Communications, E+T
Public Relations	Create a focused public relations campaign targeted towards researchers to attract them to join ISBER <ul style="list-style-type: none"> • Brown bag events with researcher • Partner with Vendors on this campaign 	June 2018	Executed PR campaign	Communications, E+T, Marketing
	Develop a public outreach campaign aimed at the general public Examine the link between this and the work being done under the policy influence objective	September 2017	Executed PR campaign	Communications, E+T, Science Policy, Marketing, public education working group, social media
	Develop and disseminate education regarding "What is a Biobank" campaign (elevator pitch)	June 2017	Developed and disseminated education campaign	Communications, E+T, Science Policy, Marketing
	Look at providing more tools for increasing membership, for example, the member justification guide	Ongoing	One new tool created in each of 2017, 2018 and 2019	Membership

Appendix 2: Summary of Interviews

ENVIRONMENTAL SCAN – CORPORATE PARTNERS

1. What are key trends that you can identify in biobanking that will impact you or your organization in the next three to five years? This may include legislative, regulatory, practice driven, social, technological, etc.

- Quality of specimens
- Global harmonization
- Technological advances
- Precision medicine
- Expansion and recognition of the industry including pharma
- Growth of cryogenics
- Data sharing
- Consent

2. What should ISBER's top three priorities be to support the biobanking field in the next three to five years?

- Global harmonization
- Encourage collaboration
- Standardization
- New technologies
- Encouraging sharing of data
- Strengthening of Special Interest Groups
- More publications and resources
- Advertising

a. What are actual or potential opportunities you can identify to advance these priorities?

- The growth of biobanking is an opportunity
- Training and education
- Influencing regulatory authorities
- Realign with ESBB and BBMRI-ERIC
- Provide tools
- Drive membership
- Quality improvements

b. What are actual or potential barriers you can identify that would limit advancement of these priorities?

- A lack of standard operating procedures
- Lack of information sharing – Brexit could be an issue within this.
- Global harmonization
- Getting people's time
- The ISBER website – navigation needs to be improved to allow for better participation

3. What could ISBER do tomorrow to improve the field of biobanking?

- Offer more training (for young people and an increase in online resources)
- More comprehensive Best Practices
- More collaboration with ESBB
- More Board of Directors action and transparency
- Inclusivity of all geographic regions as well as recruiting new members to prominent positions.
- Audio recorded presentations from annual meetings
- BIO and ISBER News Articles written by presenters

4. What can ISBER do to be more useful to your organization?

- Corporate partners need a louder voice and more interaction
- More flexible sponsorship and meeting structure
- More regional meetings especially on US west coast
- Change in cultural attitude towards vendors
- More opportunities for sponsoring discussions at annual meetings
- Enable sponsors to write articles for ISBER News

5. Do you have any ideas for collaborating with ISBER on a new project or initiative? What would you hope to achieve?

- Educational programs
- Webinars
- Talks on management topics at the annual meeting
- Growth of membership in pharma

6. Are there any biobanks, companies or organizations that ISBER should reach out to?

- Trade associations and industry bodies
- Nordic biobanks
- Non-North American biobanks
- Pharma and commercial biobanks.

7. Should ISBER partner with any new organizations? If so, which?

- ESBB
- ISCT
- ISBER is stronger when it is independent
- BBMRI-ERIC
- ABRF
- BBCMBA
- ABC

8. Do you have any other comments?

- ISBER is a great platform to be involved in.
- It is bad timing to have regional meeting at the same time as the US election.
- Website is great
- ISBER staff have been phenomenal in working with corporate partners

ENVIRONMENTAL SCAN – PARTNERS

1. What are key trends that you can identify in biobanking that will impact you or your organization in the next three to five years?

- Quality of specimens
- Sustainability
- Legislation
- Precision medicine
- Standardization
- Global harmonization

2. What should ISBER's top three priorities be to support the biobanking field in the next three to five years?

- Education
- Data (Information sharing, handling and management)
- Global harmonization – more activity in Asia
- Communication
- Advocacy
- a. **What are actual or potential opportunities you can identify to advance these priorities?**
 - Joint memberships and meetings
- b. **What are actual or potential barriers you can identify that would limit advancement of these priorities?**
 - Money
 - Legislation and different regional practices
 - Communication
 - Expertise

3. What could ISBER do tomorrow to improve the field of biobanking?

- Facilitate closer collaboration
- Start working on a global resource database.
- Begin closer work in South America

4. What can ISBER do to be more useful to your organization?

- Closer collaboration – including joint memberships and with enviro-bio
- Improved communication
- Attendance at meetings
- Regular meetings between organizations
- Harmonization
- Certification

5. Do you have any ideas for collaborating with ISBER on a new project or initiative? What would you hope to achieve?

- Education on and access to samples
- Education in LMIC and expansion into Asia
- Collaboration on Best Practices
- Collaboration on joint conferences

6. Are there any biobanks that ISBER should reach out to?

- Veterinary biobanks
- Zoological gardens in Korea
- National Germplasm – USDA in Colorado
- Jackson Labs in Maine
- San Diego Zoo
- Eastern European Biobanks that require funding
- Veterinary Schools
- Tissue and Organ Biobanks

7. Should ISBER partner with any new organizations? If so, which?

- Association of Zoos and Aquariums
- Society for Low Temperature Biology UK
- International Institute for Refrigeration
- Tissue and Organ Societies
- Cellular Therapy Societies
- Data Societies

8. Do you have any other comments?

- The meeting in Stockholm is a great project
- Keep focused on what is important to ISBER
- Interested in being updated on the progress of strategic planning at a later date to possibly contribute further
- Remain flexible and responsive to the ever-changing industry

Appendix 3: Committee Questions

1. What is the purpose/role/objective of your committee and how will it enhance the biobanking community?
2. Given the Key Strategic Directions and Strategic Objectives articulated in the current Strategic Plan, are the current Key Initiatives described in the plan still relevant and appropriate for obtaining the Objectives?
3. What are the top three key initiatives to be addressed by your committee in the next three to five years and how will the initiative be obtained?
4. What new initiatives could help us achieve the Strategic Objectives in the plan? Please describe and suggest an appropriate time plan for completion.
5. How can your committee facilitate the growth of biobanking fields and biospecimen-related groups outside of ISBER?

Appendix 4: Executive Summary of Members Survey

The ISBER Members Survey took place from April 6, 2016 until May 31, 2016. There were a total of 276 respondents overall. Not all questions were mandatory meaning that the response rate for each question differed.

The survey was completed by a broad cross-section of ISBER members with people aged from 25-65+ completing the survey as well as people with less than 2 years to more than 40 years' experience in Biobanking responding. Participants also had a variety of job roles such as managers, Directors, Coordinators and researchers. The respondents had a broad range of qualifications which included PhDs, MDs, BScs and more.

Respondents were asked a variety of questions relating to the service provided by ISBER and the strategic direction the organization should be taking. Respondents were initially asked to rate the benefits of ISBER membership in order of importance to them. The results show that access to forums, the SAT tool and Biopreservation and Biobanking Journal (BIO) were most important. Organizational and Corporate Partners were also asked to list their most favourable benefits, with access to the journal and online presence being the top choices.

Respondents were asked if they would attend webinars and workshops hosted by ISBER with most respondents confirming they would.

The survey then asked questions relating to ISBER's Working Groups and Special Interest Groups the result being that most were not members of these groups and need to be made more aware of them.

Respondents answered questions relating to how ISBER has improved their work with feedback being that the ISBER Best Practices are a great benefit.

Questions relating to how ISBER can extend its reach to colleagues in other regions and sectors showed that Regional Meetings and Workshops would be an effective way of reaching out.

Respondents were then asked various questions relating to how ISBER communicates and on which platforms which showed that most members use LinkedIn and Facebook for social media but that most still prefer to receive emails on a weekly basis.

The Members Survey indicated that participants visit the ISBER Website for access to the Best Practices and information on Annual Meetings. To improve the website, navigation could be improved according to the respondents.

Respondents noted that it was great to have the opportunity to network and have questions answered via the forum and that no change was needed on this platform.

The Survey then asked what issues ISBER should have an advocacy role in. Many respondents noted that ISBER should have a role in Ethical, Legal and Social Issues/Consent, Quality Management, Regulations and Best Practices as well as developing further information and position statements on these issues. Respondents were also asked what they thought the biggest challenges to biobanking would be in the next 5-10 years with most noting that Finance and Sustainability would be the biggest challenge.

For the full member survey, please visit: http://www.isber.org/resource/resmgr/documents/ISBER-Members_Survey_Results.pdf. Please connect with ISBER Head Office if you wish have any questions info@isber.org.

Appendix 5: Works Cited

Bryson, John M. *Strategic Planning for Public and Nonprofit Organizations*. Fourth ed. San Francisco: John Wiley and Sons, 2011. Print.



STRATEGIC PLAN
2017 – 2020



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