



5 Year Business Plan

Our Vision, Your Future: 5 Year Business Plan

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Foreword

In October 2019 at the Healthcare Estates Conference & Exhibition, IHEEM launched a high-level 5 Year Business Plan that outlined our core objectives together with a number of new initiatives under "Our Improved Offer". We also made a commitment to publish more details at the start of 2020 and I am delighted to now present this document that sets out the objectives, deliverables and key outputs the Institute aims to deliver over the next 5 years. At the end of this document there is an At-a-Glance outline of the plan that highlights how the objectives and their deliverables support the Institutes purpose and key themes.

I recognise that this is an ambitious plan and I make no apologies for that, but it is vital that IHEEM modernises and adapts to enable it to respond to new and emerging challenges and opportunities whilst retaining its core values and heritage. It is equally important that the Institute continues to work closely with the Engineering Council UK as well as raising its profile as a professional institute both in the UK and internationally. But above all, IHEEM remains totally committed to continually improving the many services and benefits it offers to all our individual and affiliate members.



I am confident that by delivering the right things in the right way this plan is achievable and will enable IHEEM to grow and develop to support our members and company affiliates to achieve their personal and professional aspirations in this fast-moving sector.

I hope that you find this document useful and that it sets the scene for what I am sure is going to be an exciting time for the Institute. Naturally the plan will continue to evolve as we implement it and you can expect to see regular updates on the IHEEM website and in the Health Estate Journal.

As always, we welcome your comments. Please feedback through your branch committee or email office@iheem.org.uk

Pete Sellars Chief Executive Officer

January 2020

Introduction

The **Institute of Healthcare Engineering & Estates Management** (IHEEM) is an International Professional Engineering Institute affiliated to the Engineering Council UK and specialising in the Healthcare Estates Sector. As the largest UK professional body dedicated to research, education and the professional development of healthcare engineers and facilities managers, its primary purpose is to serve its members by continuously improving and developing the Institute's offer.

The 5 Year Plan aims to set out a series of tangible core objectives and deliverables that will ensure IHEEM members have the capability and support to deliver a healthcare estates environment that is safe, efficient and effective for patients, staff and visitors as well as ensuring the long-term viability of the Institute.

Key Themes

The core objectives and deliverables outlined within the 5 Year Business Plan support the Institute's five Key Themes:

- 1. Serving Our Membership
- 2. Developing Future Leaders
- Engaging with New Partner Organisations
- **4.** Supporting Existing Partner Organisations
- 5. Strengthening Our National and International Profile

Core Objectives

The nine Core Objectives which are outlined within the 5 Year Business Plan are to:

- Consistently grow and develop membership
- Become a trusted partner to Government and Industry
- 3. Encourage the next generation of engineers and healthcare estates and facilities management (efm) leaders
- 4. Collaborate with training providers and industry to provide and endorse specialist NHS course content

- Develop technical seminars, events and conferences at branch and national levels to share best practice with members
- Raise the profile of IHEEM nationally and internationally and become more professional in its approach and accountability to members and the Engineering Council UK
- Create an environment for members to engage and network with other healthcare associations and institutes
- 8. Undertake a commercial review of all IHEEM's business activities to ensure long-term viability and value for money
- Develop and maintain effective Governance and Assurance across all business activities to meet both the legal requirements and the corporate needs of IHEEM Head Office, Council, Branches and Technical Platforms

Key Deliverables

Listed below are the deliverables that underpin each of the above **Core Objectives** within the 5 Year Business Plan. They may be revised or replaced as the plan evolves and in response to the needs of its members and company affiliates.

Core Objective 1 – Consistently Grow and Develop Membership

- 1.1 Identify areas for growth and reach out to a wider audience with a focus on tradespeople and apprentices
- 1.2 Develop and implement a new members marketing strategy and toolkit
- 1.3 Establish a stronger and better balance of membership through IHEEM's Diversity & Inclusion Working Group
- 1.4 Continued management of membership applications and engineering/AE registrations
- 1.5 Improve the offer to members to provide relevant and current CPD activity and simplify recording activity
- 1.6 Create an environment for members to be successful in the "non-standard route to Engineering Council UK accreditation"

Core Objective 2 – Become a Trusted Partner to Government and Industry

- 2.1 Input at Board Level on the development of a national workforce strategy for efm professionals
- 2.2 Work closely with NHS England to input into and disseminate national efm policy and strategies
- 2.3 Support the NHSI Future Standards
 Group in the redevelopment of HBN
 and HTM standards
- 2.4 Work collaboratively with Archus for the further development and wider dissemination of technical guidance using existing platforms and infrastructure

Core Objective 3 – Encourage the Next Generation of Engineers and Healthcare Estates & Facilities Management (efm) Leaders

- 3.1 Work with branches to facilitate the development of an NHS national apprenticeship programme based on a standardised model that can be adopted by providers
- 3.2 Develop a programme of workshops linked to Science, Technology, Engineering and Mathematics (STEM) subjects for Year 7 and 8 secondary school students
- 3.3 Review and expand a register for all professional specialist efm services, including Authorising Engineers

Core Objective 4 – Collaborate with Training Providers and Industry to Provide and Endorse Specialist NHS Course Content

- 4.1 Work closely with NHS Trust affiliates to develop specific training courses for trade staff, technicians, and managers
- 4.2 Encourage training providers / industry to offer CPD accreditation as an incentive to IHEEM members

Core Objective 5 – Develop Technical Seminars, Events and Conferences at Branch and National Levels to Share Best Practice with Members

- 5.1 Develop and promote branch and national conferences and technical platform seminars
- 5.2 Organise and deliver IHEEM's flagship annual conference and exhibition
- 5.3 Ensure content of technical seminars are CPD accredited in line with Engineering Council licencing requirements

Core Objective 6 – Raise the Profile of IHEEM Nationally and Internationally and Become More Professional in its Approach and Accountability to Members and the Engineering Council UK

- 6.1 Explore and develop innovative ways to promote IHEEM to existing and new membership
- 6.2 Develop and launch a revised website
- 6.3 Establish and deliver an effective communication plan using acknowledged social media and business network devices
- 6.4 Be an active member of the International Federation of Hospital Engineering (IFHE)
- 6.5 Attend and exhibit at appropriate national and local events
- 6.6 Ensure professional affiliation licences are maintained and licencing requirements adhered to

Core Objective 7 – Create an Environment for Members to Engage and Network With Other Healthcare Associations and Institutes

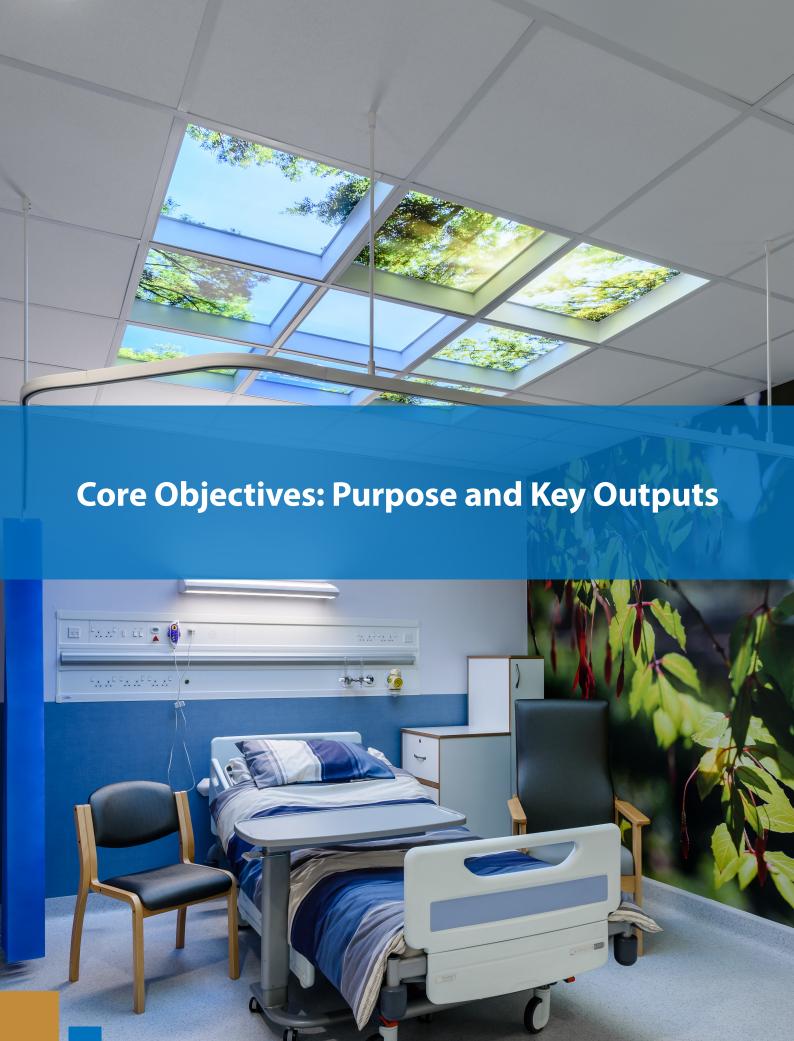
7.1 Strengthen engagement with industry, academia and professional bodies that are aligned to core efm functions to support members and raise the profile of efm as a profession

Core Objective 8 – Undertake a Review of all IHEEM's Business Activities to Ensure Long-Term Viability and Value for Money

- 8.1 Review annual conference and develop a long-term strategy
- 8.2 Review all of IHEEM's annual revenue costs (e.g. contracts, subscriptions, infrastructure) to ensure fit for purpose and value for money
- 8.3 Seek alternative income sources (e.g. lottery, charitable trusts)

Core Objective 9 – Develop and Maintain Effective Governance and Assurance Across All Business Activities to Meet Both the Legal Requirements and Corporate Needs of IHEEM's Head Office, Council, Branches and Technical Platforms

- 9.1 Develop a "hub and spoke" operating and resource model between Head Office and Branches to allow Branches to engage and support the Institutes national plans
- 9.2 Maintain effective financial controls and management ensuring compliance with statutory and mandatory regulations
- 9.3 Develop a new Customer Relationship Management (CRM) system for improved membership applications
- 9.4 Produce a new Standard Operating Manual for all processes, procedures and standards required to ensure efficiency and consistent performance of business functions
- 9.5 Review Technical Platform (TP) groups and develop an overarching operational framework
- 9.6 Organise and deliver IHEEM council/ trustee training days
- 9.7 Develop a sustainability policy/ statement for the Institute



Core Objective 1 - Consistently grow and develop membership

Purpose

The membership of IHEEM is its most valuable asset and strength. Members fees are one of the main income streams. for the Institute so it is vital for IHEEM to evolve and grow so that it can reinvest more into products and benefits to better serve its members. This means effective marketing and delivery of more events, support, guidance and relevant education that is strongly linked to career development and, in the case of Continuing Professional Development (CPD) accredited events, ensuring that members working in the healthcare efm sector are valued and respected for their skills, knowledge and experience.

Developing the membership and providing a high level of customer service to existing and new members maintains the Institute's reputation as the UK's largest professional body and engenders the confidence of its members and stakeholders.

It is also important that the membership reflects much wider inclusion and diverse representation that will strengthen and unify the efm voice and secure a sustainable and "better balanced" healthcare engineering workforce. Having an effective marketing strategy that ensures information about the Institutes activities and benefits reaches new and wider audiences will boost growth from other sectors.

Key Outputs

- Provide easier and quicker membership application process via the new IHEEM website
- Revise and simplify pricing structure for attendance at IHEEM events
- Simplify and automate members CPD experience (e.g. CPD app, automatic website integration, internal software packages and recording scanners for attendance at events)
- Ensure Technical Platforms deliver at least one sponsored CPD event a year
- Engage with specialist providers so that Branches can deliver relevant and affordable CPD accredited events
- Appoint a dedicated IHEEM STEM Ambassador and work in partnership with WES (Women's Engineering Society) to support female engineers and encourage them to see healthcare engineering as a career option
- Ensure diversity and inclusivity is embraced in everything we do and is promoted at the annual Healthcare Estates Conference & Exhibition
- Ensure events are easily accessible to corporate and personal members and can be transposed to a variety of locations

previous page photo: Static Systems Group Plc

Core Objective 2 - Become a "trusted partner" to Government and industry

Purpose

IHEEM will position itself as the leading professional body that can be relied upon to provide robust advice, support and guidance and is able to directly influence Government policy and industry initiatives. This in turn will enable it to support members to be better informed and able to embed guidance and national standards into the system.

- Develop a pipeline of seminars to follow on from the publication of new national healthcare estates technical quidance
- Establish and trademark IHEEM Publications to produce Best Practice Guidance for Practitioners across each TP discipline
- Input into the National Workforce Strategy programme led by NHS England and NHS Improvement to ensure that effective long-term succession planning for the sector becomes a priority







Core Objective 3 - Encourage the next generation of engineers and healthcare efm leaders

Purpose

It is now widely recognised that there is an ongoing engineering skills gap in the UK. Future generations of able, enthusiastic and suitably qualified professionals are vital to the efficient running and maintenance of healthcare facilities. IHEEM has successfully raised awareness of the need within the sector and the NHS Long Term Plan clearly sets out the important role of the healthcare estates workforce as key enablers in the success of that plan.

IHEEM is therefore committed to encouraging and incentivising talented people of all ages and backgrounds, particularly school-leavers and undergraduates into the healthcare engineering profession to innovate and add value to the professional as well as to fill the expected shortfall in numbers. It will engage with students at the right stage to influence their educational and vocational choices and prospective career path development.

As part of the wider workforce planning agenda, IHEEM will support the career development of members who have not had the advantage of formal training and/or qualifications but are able to demonstrate that they have the necessary competences through working evidence, to achieve professional engineering status via the Engineering Council UK approved "non-standard" route.

- Develop a formal programme to prepare members for, and support them through, a non-standard, individual route to accreditation
- Take a staged approach to develop and deliver a national, accredited IHEEM apprenticeship framework, based on an existing successful model, with appropriate funding and long-term partners
- Where appropriate match fund financial commitments for apprenticeship places by NHS Trusts to increase the number of available places across wider geographical boundaries
- Develop and launch a National Bursary programme with financial support from industry
- Appoint an Apprentice Champion for each IHEEM Branch
- Explore the potential to develop apprentice initiatives with training providers
- Provide healthcare estates apprentices with free IHEEM membership and attendance at the annual Healthcare Estates Conference where there will be an **Apprentice Zone** with a dedicated programme of speakers
- Establish a platform that allows company affiliates to advertise graduate schemes/apprenticeships through IHEEM
- Deliver a programme of workshops for schools aligned to the **People Like Me** initiative that will allow engagement with students aged 14/15

Core Objective 4 - Collaborate with training providers and industry to provide and endorse specialist NHS course content

Purpose

Linking closely to **Core Objectives 1** and **5**, this supports delivery of one of the key purposes of the Institute "to serve members in the best way possible by keeping them up to date with developing technology and changing regulations" (**Our Vision to 2021**, published Spring 2019).

It is important that training providers understand the value of adding accreditations such as CPD to their courses and in turn that members are supported to undertake CPD activity that is relevant and vital to their own career as an efm professional.

Key Outputs

- Develop and deliver a range of CPD accredited training courses, working with employers, to be delivered through the IHEEM Branch Network
- Strengthen links with current company affiliates such as Eastwood Park Training to develop future marketing opportunities and possible utilisation of venues for CPD events

Core Objective 5 - Develop technical seminars, events and conferences at Branch and National levels to share best practice with members

Purpose

Branches have a fundamental role in engaging directly with members at a local level and they have the potential to reach out to and connect with a wider audience.

With support from Head Office, Branches will work to raise their profile, promote the Institute and be more active locally. They will support and encourage new and existing members and develop opportunities to engage with potential new partner organisations.

- Develop a mechanism to allow branches to bid for central funding to deliver initiatives that support national priorities and improve the offer to members
- Develop a standardised pricing schedule for members and nonmembers making all events more cost attractive and accessible
- Ensure that events are scheduled and promoted with sufficient time to allow members to plan their attendance
- Work closely with IHEEM Technical Platforms to support the marketing and delivery of an annual programme of specialist technical seminars

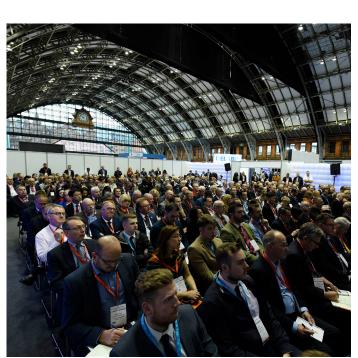
Core Objective 6 - Raise the profile of IHEEM Nationally and Internationally and become more professional in approach and accountability to members and the Engineering Council UK

Purpose

IHEEM will continue to work alongside organisations with shared values and objectives so that it can remain a respected member of the healthcare efm community. It will also maintain its international focus and close ties with its many global members to share knowledge, best practice and explore where any synergies can be identified for the benefit of its members. The Institute will also develop events and conferences that will attract international delegates.

In an ever-expanding digital world it is paramount that IHEEM utilises effective communication channels such as social media so that it can engage, inform and interact with a wider audience both in the UK and abroad. Developing events and conferences that will attract international delegates will also be of value so there are more opportunities to share knowledge and experience and promote the success of IHEEM's international activities.

- Maintain relationships with the Engineering Council UK and other professional organisations
- Build on existing international business opportunities similar to those with China and Hong Kong
- Develop and launch a new and improved IHEEM website
- Deliver a combined North / South Ireland Conference and Exhibition
- Devise a social media content strategy
- Strengthen links to IFHE and IFHE (EU) members and encourage contributions to newsletters, journals etc









Core Objective 7 - Create an environment for members to engage with other healthcare associations and Institutes

Purpose

As an organisation that is dedicated to the professional development of its members it is important that IHEEM becomes the "go to" organisation for them to link into relevant organisations that offer support, knowledge and learning and to take full advantage of any opportunities on offer.

IHEEM will also focus on strengthening its links to its Company Affiliates and is committed to ensuring that they are valued and heard and able to raise their own profile and effectively engage with the membership.

Key Outputs

- Establish programmes that support the development and upskilling of the tradespersons and technician levels within the efm workforce
- Develop and hold two free annual events for new and existing Company Affiliates to communicate opportunities and discuss their needs and aspirations
- Hold an annual event to engage with academia to discuss and explore mutually beneficial opportunities
- Identify and develop new partnerships with key organisations and bodies that align with or operate alongside efm healthcare specialisms

Core Objective 8 - Undertake a commercial review of all IHEEM's business outputs to ensure long-term viability and value for money

Purpose

IHEEM has a duty to ensure that it makes best use of its funding to better serve its members and Company Affiliates whilst protecting the business and ensuring its long-term financial viability and professional integrity.

Reviewing and evaluating its business activities and costs in terms of value for money is a corporate responsibility and will be embedded into all its business functions.

- Undertake a commercial review of the annual Healthcare Estates Conference & Exhibition and develop a future commercial model based on an open and transparent partnership that is innovative and customer focused whilst ensuring an improved financial outcome for the Institute
- Develop a non-commercial sponsorship model for events to ensure long-term viability and value for money
- Review current IT systems and commission improvements to ensure future proofing for digital work systems

Core Objective 9 - Develop and maintain effective governance and assurance across all business activities to meet both legal requirements and corporate needs

Purpose

Robust governance and assurance underpins all business activity within IHEEM. It provides clarity and consistency across the organisation for the benefit of employees and everyone involved in the Institutes activities.

It also ensures adherence to legal requirements, including the regulations set out by the Charities Commission for England and Wales, and therefore provides a solid foundation for its long-term future. Having the right policies and procedures in place also ensures business continuity, should an unexpected event occur that may have unfortunate consequences.





- Produce a Standard Operating Manual covering all system processes, procedures and standards
- Increased Technical Platform meetings and events
- Develop and implement a new IT cloudbased membership database
- Transfer in-house production of management accounts
- Ensure all business activity is GDPR compliant
- Develop an IHEEM Sustainability Policy, recognising the wider importance of this agenda and how the Institute can influence its impact on the healthcare environment





Resources

Financial

Whilst the key deliverables and outputs outlined in this plan are ambitious and challenging they are affordable within the forecast revenue and expenditure. Specific programmes of work will be costed as part of their individual delivery plans and ratified in line with the Institute's governance structure. Further finance information will be made available in the IHEEM Annual Report.

The Institute will continually review its annual costs in line with **Core Objective 8** (see page 13) to ensure value for money.

Workforce

The Institute employs a core team of Head Office staff who work alongside and support a large number of highly valued and committed volunteer professionals within the branches, technical platforms, councils and committees. It is vital that partnership working and effective stakeholder engagement is maintained at every level.

To meet the needs of members, an operating model will be developed to ensure there are formal links to the Head Office across all the different parts of IHEEM's business. (See **Core Objective 9**, *Page 14*)







Values and Behaviours

Supporting members, company affiliates, stakeholders and staff to achieve their individual goals and corporate ambitions is at the heart of everything IHEEM does. We have defined the following core values and will work extensively to embed them across all parts of the Institute:



The following behaviours underpin the above values and will be demonstrated in everyday practice and experience and enable us to be effective as a professional organisation:

- is professional and behaves with integrity at all times
- acts as a champion for the Institute and supports colleagues, challenging negative attitude and behaviour when necessary
- pro-actively contributes to team objectives and the Institute's 5-year Business Plan
- is honest and transparent and not afraid to speak up when something does not go to plan
- commits to working with and supporting others as part of a team
- actively listens to and builds rapport with customers
- makes it easy for members to contact and use the service
- seeks out the best practical solutions whilst managing expectations
- listens and reacts constructively to new ideas
- suggests new ways of working that could improve the effectiveness of the Institute
- commits to and openly supports change initiatives
- consistently adopts best practice in their own work
- keeps up to date with new practices

- always treats others dignity and respect
- reflects on the impact of their behaviour on others
- deals sensitively and appropriately with challenging behaviour by others
- demonstrates an understanding and positive attitude towards diversity
- is open-minded, fair and actively contributes to the development of an inclusive work environment

At a glance Business Plan



Our Purpose

healthcare estates environment that is safe, efficient and effective for patients staff and visitors

3 - Engaging with New Partner Organisations

2 - Developing Future Leaders

1 - Serving Our Membership

Our 5 Key Themes

Core Objectives

To continuously improve and develop the Institute, its services and the benefits we offer to ensure our members have the capability to deliver a

5 - Strengthening our National and International Profile

4 - Supporting Existing Partner Organisations

→	8 Undertake a commercial review of all IHEEM's business activities to ensure long-term viability and value for money	Review annual conference and develop a long-term strategy arrategy Review all of the organisation's annual revenue cots (e.g. contracts, subscriptions, infrastructure) to ensure fitness for purpose and value for money) Seek alternative income sources e.g. lottery, charitable trusts
→	Create an environment Un for members to engage rand network with other bhealthcare associations ensand institutes	engagement with industry, academia and professional bodies that are aligned to core effm functions to support members and raise the profile of efm as a profession
→	Raise the profile of IHEEM Nationally and Internationally and become more professional in its approach and accountability to members and the Engineering Council UK	6.1 Explore and develop innovative ways to promote IHEEM to existing and new membership 6.2 Develop and launch a revised website 6.3 Establish and deliver an effective communication plan using acknowledged social media and business network devices 6.4 Be an active member of the International Federation of Hospital Federation of Hospital Engineering (IFHE) 6.5 Attend and exhibit at appropriate national and local events 6.6 Ensure professional affiliation licences are maintained and licencing requirements adhered to requirements adhered to promote and incenting requirements adhered to promote and promote and incenting requirements adhered to promote and incenting requirements adhered to promote and promote and incenting requirements adhered to promote and
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→	4 Collaborate with training providers and industry to provide and endorse specialist NHS course content	4.1 Work closely with NHS Trust affiliates to develop specific training courses for trade staff, technicians, and managers 4.2 Encourage training providers/industry to offer CPD accreditation as an incentive to IHEEM members
→	3 Encourage the next generation of Engineers & Healthcare Estates & Facilities Management (efm) leaders	3.1 Work with branches to facilitate the development of an NHS national apprenticeship programme based on a standardised model that can be adopted by providers 3.2 Develop a programme of workshops linked to Science, Technology, Engineering and Mathematics (STEM) subjects for Year 7 & 8 secondary school students 3.3 Review and expand a register for all professional specialist efm services including Authorising Engineers
→	2 Become a "trusted partner" to Government and Industry	2.1 Input at Board Level on the development of a national workforce strategy for efm professionals 2.2 Work closely with NHS England to input into and disseminate national efm policy and strategies 2.3 Support the NHSI Future Standards Group in the redevelopment of HBN and HTM standards 2.4 Work collaboratively with Archus UK for the further development and wider dissemination of technical guidance using existing platforms & infrastructure
→	1 Consistently Grow and Develop Membership	1.1 Identify areas for growth and reach out to a wider audience with a focus on tradespeople and apprentices 1.2 Develop and implement a new members marketing strategy and toolkit 1.3 Establish a stronger and better balance of membership through IHEEM's Diversity & Inclusion Working Group 1.4 Continued management of membership applications and engineering / AE registrations 1.5 Improve the offer to members to provide relevant and current CPD activity and simplify recording activity 1.6 Create an environment for members to be successful in the "non-standard route to Engineering Council UK accreditation"
	Core Ubjectives	Deliverables

Deliverables

Core Objective 9

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standards required to ensure efficient and consistent performance of business

Maintain effective financial controls & management ensuring compliance with

statutory and mandatory regulations

9.5

9.1

9.5 Review technical platform groups and develop an overarching operational

9.6 Organise and deliver IHEEM council/frustee training days 9.7 Develop a sustainability policy/statement for the Institute



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