



## **1 Introduction**

This document sets out the Society's strategic priorities for the 2024-26 period.

It primarily consists of a set of strategic priorities, grouped under six strategic goals. These are required to deliver our vision for the Operational Research community through the Society's mission and aims. It addresses weaknesses and threats but builds on our strengths and aims to exploit opportunities.

The period covered by this business plan is one where a number of significant challenges (and hence opportunities) will be considered. Perhaps the most immediate is setting out the Society's plan to address the forecast reduction in publications revenue and the impact this may have on the Society meeting its strategic and charitable objectives. The other significant challenge and opportunity is Operational Research's place in the rapidly evolving AI / data science / analytics landscape. This is a strategic imperative for the Society.

Similarly, social & environmental sustainability is now a key theme, both as an area where OR has much to offer, and for organisations such as the Society to adapt their operating practices. The Society will actively work towards Pledge To Net Zero and other practices and initiatives that enable us to remain a responsible, socially and environmentally conscious organisation and employer.

In recent years, the Society has taken steps to make its governance more rigorous. We continue to refine our Governance processes (as part of our strategy development work) and it's in that framework that this business plan must exist. We will continue to iterate to help ensure all of the Society's activities are focussed and well-intentioned.



## 2 Mission, Vision and Role

The **objects** for which the Society is established are:

- the advancement of knowledge and interest in Operational Research; and
- the advancement of education in Operational Research.

These are achieved through various powers to the Society, as detailed in its constitution.

The **Mission Statement** for the OR Society is:

To be a vibrant, visible and valued society which exceeds the expectations of members and effectively promotes the use of OR, such that it is highly respected both in the UK and internationally.

Put simply: **Vibrant, Visible and Valued**

The Society's **vision** is:

To build a world improved by rigorous analysis and better, evidence-based, decision-making: "OR providing world class analysis for world class decisions".

In this world OR would not be merely seen as "nice to have" but as indispensable and be used and acknowledged widely in all areas of industry, business, government and the 3rd sector.

To achieve that vision the Society's **Aims** are that:

- decision makers understand how OR can help, value and seek its contribution, and know from whom they can get it; and
- operational researchers are knowledgeable, [innovative] and well-trained, and in good supply.

In support of that vision the Society also aims to:

- have a vibrant and active membership drawn from diverse areas; and
- be well-run, provide excellent services and be adequately and sustainably resourced.

The **Values** of the OR Society are:

Rigorous – rooted in evidence, rational analysis and strong historic principles

Inclusive – vibrant community united by a common passion and purpose

Proactive – leading improvements to services, processes, systems and outcomes

Supportive – helpful, responsive and customer focussed



### **3 The Roles of The Society**

It is important to acknowledge that The OR Society operates under a number of different banners and must balance the needs of each, which at times can result in conflicts.

#### **Professional body**

To support the professional development of people working in OR and related disciplines.

#### **Learned society**

To bring together the OR community, to develop its thinking and to support the ongoing development of the broader discipline.

#### **Publisher**

To support learning and dissemination of knowledge by working with researchers in all OR and related disciplines across the world (through its close working relationship with Taylor & Francis).

#### **Membership body**

To provide valued services to our members that are relevant to their stage of career and location.

#### **Influencer**

To help OR be seen as a useful contributor to matters of national and international importance.

#### **Charity**

To ensure that OR can fulfil its potential to benefit society.



## **4 Six Strategic Pillars**

These pillars, priorities or goals originally stemmed from the output of the Board's strategy workshop in October 2019 and subsequent discussions in 2020 which formalised them. We have undertaken some recent strategy work in 2023 to review/revisit this work and confirm that the strategic pillars remain relevant and fit for purpose. They primarily consist of a set of strategic priorities, grouped under six strategic goals. These priorities map to the SWOT and Vision exercises that were undertaken. They are required to deliver the elements of the vision, address weaknesses and threats, build on our strengths or exploit opportunities.

The strategic pillars for the coming three to five years are:

- Raise awareness of the importance of OR;
- Support OR knowledge development;
- Support OR education;
- Grow membership and wider reach;
- Ensure financial sustainability of the Society; and
- Embed good diversity practice in OR and the ORS

The Society's Senior Leadership Team (SLT) followed up the 2019 and 2020 business planning activity by applying an OGSM approach – objectives, goals, strategies and measurement. Under each of the strategic pillars, there is an objective (which describes what we do) and three strategies (which articulate how we do it).

For each of the goals there is a set of current Business-as-usual (BAU) activities that support the goal, plus a set of strategic priorities for focus during the planning period. Similarly, a simple mapping shows how the priorities relate to the Society's main committees.

The team also considered which KPIs might best be used to measure progress against these objectives and strategies. These are set out in Section 6.



#### 4.1 Raise awareness of the importance of OR

Data, its presentation, interpretation and use, is increasingly prevalent in the today's world. There is, however, a remarkable lack of public knowledge about it, what it means and what it can do. These are all core strengths of operational research. Whilst the profession can cite many impactful uses and applications of OR, the benefits of using or applying OR principles remain relatively unknown.

In terms of context, this strategic pillar covers decision makers in Government and the Private Sector; the wider analytics / AI / data science community; and the general public (including those in education).

<b>What we do:</b>
We champion the impact that Operational Research has on enhancing our everyday lives and its role in solving global challenges
<b>How we do it:</b>
1. We ensure decision makers understand how OR can help, value and seek its contribution, and know from whom they can get it
2. We build policy influence with key government contacts
3. We highlight interesting, impactful real-world examples of OR
<b>BAU activities supporting the goal:</b>
Pro Bono OR
OR in Education
OR exhibition
Impact magazine
Website, social media and targeted PR campaigns
<b>Strategic activities:</b>
Create and disseminate knowledge through our OR exhibition and effective use of case studies & PR
Build policy influence with key Government contacts through our work with the AcadMathSci, Science Council and AfDSP
Implement an engagement plan for the Analytics/AI/data science community
Build media profile through a PR Campaign and effective use of social media
Build a strong network of partner organisations (other societies, etc.)
Demonstrate the relevance of OR to complex problems and big issues
Launch 'Find OR Member/Professional' website functionality



## 4.2 Support OR knowledge development

OR and the closely related areas of analytics, data science and artificial intelligence represent a field that is rapidly expanding and developing. The Society plays a key role in knowledge exchange with its members and wider community reach. This strategic pillar is intended to foster the ideal environment for research to flourish and for the associated exchange of learning and ideas to happen as widely and efficiently as possible.

<b>What we do:</b>
We deliver inspiring, world-leading OR and analytics knowledge resources at every stage of education and professional development
<b>How we do it:</b>
1. We share cutting-edge research through our world-class portfolio of (academic) journals
2. We deliver relevant, life-long learning and networking opportunities through our extensive programme of conferences and events
3. Increase scale and impact of OR research in the UK
<b>BAU activities supporting the goal:</b>
Journals
Conferences / Events
SIGs and Regional Societies
Engagement with funding bodies
Awards
<b>Strategic activities:</b>
Contribute to the Maths Summit and build influence through AcadMathSci
Strengthen UKRI relationship, particularly with EPSRC



### 4.3 Support OR education

OR needs a strong pipeline of people coming into the profession to ensure it continues to grow and prosper. Through the ever-increasing adoption and interest in analytics, data science and artificial intelligence, the demand for qualified and experienced people with OR-like skills is higher than perhaps ever before. The start of the pipeline needs more people to have awareness of OR and the options it offers as a potential career path, and the tools that we use to shape the flow through the pipeline need to be ever adapting and of the highest quality.

<b>What we do:</b>
We strive to ensure operational researchers are knowledgeable, well-trained, and in good supply
<b>How we do it:</b>
1. We provide a wide-ranging programme of world-class training in OR, analytics and data science
2. We want every child to be aware of OR, the value it brings to society and think positively about its career possibilities
3. We seek to grow the number of people with the capability to undertake OR practice and research in the UK
<b>BAU activities supporting the goal:</b>
Training
OR in Education
Conferences / Events
Regional Societies / Special Interest Groups
<b>Strategic activities:</b>
Deliver Ofqual recognition as an EPA Awarding body and grow a portfolio of Qualifications
Attract a global audience to our events, training and member products and services
Enhance training programme to support wider strategic goals
Consider degree course accreditation



#### 4.4 Grow membership and wider reach

To work towards achieving its vision, the Society and the wider OR community needs more people to be aware of OR, the Society and its activities, whether this is as contacts or members. Previous incarnations of the business plan separated reach and visibility, but this led to confusion as to what each meant and covered. This pillar brings both together with the simple ideal that more people know more about what we do, either as part of a wider reach, or ideally as part of a growing and more engaged membership.

<b>What we do:</b>
We aim to promote and grow the society as the professional home for our dynamic communities of operational researchers and analysts
<b>How we do it:</b>
1. We provide a variety of opportunities for both members and non-members to engage with the OR community and the OR Society
2. We develop and promote a clear sense of purpose and passion for OR & its community
3. We enable our community to demonstrate competency, professionalism and achieve recognition
<b>BAU activities supporting the goal:</b>
Membership proposition
Inside OR
Networks, Special Interest Groups and Regional Societies
Various routes to accreditation – FORS etc., CSci, CAP
<b>Strategic priorities:</b>
Implement a Digital Transformation to create more tailored membership propositions plus flexible online services
Increase member recruitment and retention – particularly amongst students and corporates
Provide a mentoring offer for members
Strengthen SIGs / regional societies / conference streams
Continue to support initiatives on the professionalisation of data science





#### 4.5 Ensure financial sustainability of the Society

Whilst this might be the least 'sexy' of the strategic pillars, it could be argued to be the most important as without financial stability, the Society's ability to deliver its vision could be severely curtailed.

The Society has seen great financial reward from its activities, primarily in the form of revenue from its publishing contracts. The key aim of this pillar is to ensure diverse revenue streams are created and supported as a foundation for all of the Society's work.

<b>What we do:</b>
Provide a sustainable, financial position to ensure our long-term growth and stability
<b>How we do it:</b>
1. We use rigorous reporting processes to ensure our financial performance is focussed on the Society's aims
2. Use scenario planning and modelling to deliver long-term financial stability
3. Grow proportion of revenue from membership, training courses and events to reduce reliance on publications
<b>BAU activities supporting the goal:</b>
Governance – Board, General Council & committees
Management, including Senior Leadership Team
<b>Strategic priorities:</b>
Address Open Access / Plan S risks to journal income – deliver a new OA journal
Diversify income, including exploring new streams (accrediting university courses, fundraising, donations, sponsorship)
Strengthen financial management processes



#### 4.6 Embed good diversity practice in OR and the ORS

The Society signed the Science Council's declaration on diversity, equality and inclusion in December 2015 and has been working towards improving its EDI performance ever since. As you will see below, the ambition to embed this is all areas of the Society and its activities. With this as an ambition, it might appear odd to list it as a separate strategic goal; surely it should be an integral part of all other strategic activity. However, it is such a key part of the Society's overall strategic thinking, that it needs to be considered in its own right to ensure we maintain our focus on it.

<b>What we do:</b>
We seek to improve diversity through improving inclusivity
<b>How we do it:</b>
1. We aim to identify and remove barriers to inclusion
2. We make evidence-based EDI decisions based on data collected across all our activities
3. We aim to embed EDI across all areas of the Society and its activities
<b>BAU activities supporting the goal:</b>
Re-assessment against the Science Council D&I Framework
Improve diversity data collections (events and membership)
Committees engaged in EDI discussions and activities recorded
Membership inclusion survey carried out every three years
Education in EDI (through EDI calendar of events, linking to other areas, and seeking feedback from our members to help improve our collective awareness)
Annual review of progress
<b>Strategic priorities:</b>
Create an EDI programme
Improve our collection, storage and analysis of data on diversity
Improve our Employer commitments to EDI – e.g. Living Wage Employer, Mindful Employer, Disability Confident, Armed Forces ERS.



## 5 Mapping the strategic pillars to our committee structure

The six strategic pillars are thoroughly mixed across both the business-as-usual work and strategic initiatives being undertaken by the Staff team with support and direction from Board, General Council and the various committees. This section sets out the mapping between the two aspects at a high level. If a particular pillar is not shown as directly relevant to a committee, this does not mean it has nothing to contribute, nor that it shouldn't consider the aims of that pillar.

Despite what is shown in this mapping ALL committee activity should be guided by the six strategic pillars. If suggested activity does not align with the pillars, a committee ought to question whether that activity should be a focus.

### 5.1 Raise awareness of the importance of OR

We champion the impact that Operational Research has on enhancing our everyday lives and its role in solving global challenges.

How we do it (strategies)	Educn.	Events	PMW	Publicitns	Research	Board etc.	Other
We ensure decision makers understand how OR can help, value and seek its contribution, and know from whom they can get it		Yes	Yes				
We build policy influence with key government contacts					Yes	Yes	
We highlight interesting, impactful real-world examples of OR	(ORiE)	Yes	Yes	Yes	Yes		



## 5.2 Support OR knowledge development

We deliver inspiring, world-leading OR and analytics knowledge resources at every stage of education and professional development.

How we do it (strategies)	Educn.	Events	PMW	Publicitns	Research	Board etc.	Other
We share cutting-edge research through our world-class portfolio of (academic) journals				Yes			
We deliver relevant, life long learning and networking opportunities through our extensive programme of conferences and events.		Yes			Yes		ADG?
Increase scale and impact of OR research in the UK				Yes	Yes		

## 5.3 Support OR education

We strive to ensure operational researchers are knowledgeable, well-trained, and in good supply.

How we do it (strategies)	Educn.	Events	PMW	Publicitns	Research	Board etc.	Other
We provide an wide-ranging programme of world-class training in OR, analytics and data science	Yes *						TWG
We want every child to be aware of OR, the value it brings to society and think positively about its career possibilities	Yes *						ORiE
We seek to grow the number of people with the capability to undertake OR practice and research in the UK	Yes	Yes			Yes		



### 5.4 Grow membership and wider reach

We aim to promote and grow the society as the professional home for our dynamic communities of operational researchers and analysts.

How we do it (strategies)	Educn.	Events	PMW	Publicitns	Research	Board etc.	Other
We provide a variety of opportunities for both members and non members to engage with the OR community and the ORS		Yes	Yes		Yes		
We develop and promote a clear sense of purpose and passion for OR & its community			Yes			Yes	
We enable our community to demonstrate competency, professionalism and achieve recognition	Yes		Yes (Acc Panel)				

### 5.5 Ensure financial sustainability of the Society

Provide a sustainable, financial position to ensure our long term growth and stability.

How we do it (strategies)	Educn.	Events	PMW	Publicitns	Research	Board etc.	Other
We use rigorous reporting processes to ensure our financial performance is focussed on the Society's aims							Finance
Scenario planning and modelling to deliver long term financial stability						Yes	Finance
Grow proportion of revenue from membership, training courses and events to reduce reliance on publications	Yes	Yes	Yes				



## 5.6 Embed good diversity practice in OR and the ORS

We seek to improve diversity through improving inclusivity.

How we do it (strategies)	Educn.	Events	PMW	Publicitns	Research	Board etc.	Other
We aim to remove barriers to inclusion	Yes	Yes	Yes	Yes	Yes	Yes	
We make evidence-based D&I decisions based on data collected across all our activities	Yes	Yes	Yes	Yes	Yes	Yes	
We aim to make EDI everyone's business (NM)	Yes	Yes	Yes	Yes	Yes	Yes	

As stated elsewhere in this document, the objective is to make EDI a core part of all Society activities.



## 6 Measuring Success: ONGOING TARGETS AND KPIS

This set of targets/KPIs is intended to provide a basic high-level oversight of the state of the ORS's routine business. Individual committees, including Board, will need to use more detailed KPIs to monitor activity and quality and to identify/diagnose issues and opportunities.

### 6.1 Raise awareness of the importance of OR

We champion the impact that Operational Research has on enhancing our everyday lives and its role in solving global challenges.

How we do it (strategies)	Suggested KPIs	Comments
We ensure decision makers understand how OR can help, value and seek its contribution, and know from whom they can get it	#Number of OR members involved in key Science Council, AcadMathsSci workstreams.	
We build policy influence with key government contacts	# relevant meetings # thought leadership pieces published # Events to engage Government	Report list of meetings
We highlight interesting, impactful real-world examples of OR	# downloads/views - Impact magazine # downloads/views – website case studies # Quantitative and qualitative data from PR campaigns	

### 6.2 Support OR knowledge development

We deliver inspiring, world-leading OR and analytics knowledge resources at every stage of education and professional development.

How we do it (strategies)	Suggested KPIs	Comments
We share cutting-edge research through our world-class portfolio of (academic) journals	# (journal) article downloads # improved citation metrics and impact factors	
We deliver relevant, life long learning and networking opportunities through our extensive programme of conferences and events.	# delegate days # delegate numbers # events # UK and Global participants	
Increase scale and impact of OR research in the UK	£ research coded to OR	Difficult. Would only be for EPSRC. Wide range of other funding sources are actually used. Research committee to consider further.



### 6.3 Support OR education

We strive to ensure operational researchers are knowledgeable, well-trained, and in good supply.

How we do it (strategies)	Suggested KPIs	Comments
We provide an wide-ranging programme of world-class training in OR, analytics and data science	# courses # delegate days Quality score	
We want every child to be aware of OR, the value it brings to society and think positively about its career possibilities	Existing measures of # children 'reached' (ORIE)	
We seek to grow the number of people with the capability to undertake OR practice and research in the UK	# apprentices and cohorts # additional qualifications Academic pipeline survey outputs # students graduating from OR & Analytics Masters courses	

### 6.4 Grow membership and wider reach

We aim to promote and grow the society as the professional home for our dynamic communities of operational researchers and analysts.

How we do it (strategies)	Suggested KPIs	Comments
We provide a variety of opportunities for both members and non members to engage with the OR community and the ORS	# opportunities / events Quality score # membership numbers, retention statistics # digital community stats	
We develop and promote a clear sense of purpose and passion for OR & its community	Membership survey # volunteers	
We enable our community to demonstrate competency, professionalism and achieve recognition	# accreditees, CSci, CAP # apprentices	





## 6.5 Ensure financial sustainability of the Society

Provide a sustainable, financial position to ensure our long term growth and stability.

How we do it (strategies)	Suggested KPIs	Comments
We use rigorous reporting processes to ensure our financial performance is focussed on the Society's aims	Forecast accuracy (budget vs. actuals)	
Scenario planning and modelling to deliver long term financial stability	# ROI for new initiatives	
Grow proportion of revenue from membership, training courses and events to reduce reliance on publications	Revenue growth targets % split by revenue lines	

## 6.6 Embed good diversity practice in OR and the ORS

We seek to improve diversity through improving inclusivity.

How we do it (strategies)	Suggested KPIs	Comments
We aim to remove barriers to inclusion	#Survey data - Measure of inclusivity	
We make evidence-based D&I decisions based on data collected across all our activities	#Survey data	
We aim to make EDI everyone's business	#Progress against Science Council framework #Compliance with employer based schemes	

For reference, the existing management KPIs are given in Appendix B below. The list is almost certainly too extensive for high level monitoring of strategy.



**APPENDIX A: Existing KPIs**

Quarterly:

<b>Members</b>	
	Total Membership
	Full - all categories
	Full - std members only
	Student
	Retired
	Full Joiners (inc. reinstated)
	Full Resignations / Lapsers
	Post-student Resig./Lapsers
<b>Corporate Partners</b>	
	No. of Partners
	Affiliates
<b>Training Courses</b>	
	No. Offered
	No. Run
	Total Attendance
<b>Regional Societies</b>	
	Active RSs
	No. of Meetings
	Total Attendance
	Percentage members/affiliates
<b>Special Interest Groups</b>	
	Active SIGs
	No. of Meetings
	Total Attendance
	Percentage members/affiliates
<b>Member Digital Engagement</b>	
Website/ Digital community page impressions, dwell time	
E-Inside OR - data	
<b>Online Presence</b>	
	LinkedIn Group Members
	LinkedIn Company Page
	LinkedIn Followers
	Posts
	Impressions
	Impressions per Post
<b>@TheORSociety</b>	
	Twitter Followers
	Tweets



	Twitter Impressions
	Impression / Tweet
@ORinEducation	
	Twitter Followers
	Tweets
	Twitter/X Impressions
	Impression / Tweet
@ProBonoOR	
	Twitter/ X Followers
	Tweets
	Twitter/ X Impressions
	Impression / Tweet
@ORS_Res	
	Twitter/ X Followers
	Tweets
	Twitter/ X Impressions
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	Citation Score (Impact Factor)
	Ranking in OR & Mgmt Sci category
	Ranking in Management category
EJIS	
	Issues Published
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	Citation Score (Impact Factor)
	Ranking in Computer Sci & Info Sys category
	Ranking in Info. Sci & Library Sci category
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	Issues Published
	Pages Published
	Papers Published
	Ave. Pages / issue
	Ave. Papers / issue
	Institutional Subscriptions
	Web visits ('000)
	Citation Score (Impact Factor)
	Ranking in Info. Sci & Library Sci category
	Ranking in Management Sci category
JOS	
	Issues Published
	Pages Published
	Papers Published
	Ave. Pages / issue
	Ave. Papers / issue
	Institutional Subscriptions
	Web visits ('000)
	Citation Score (Impact Factor)
	Ranking in Comp. Sci Interdisciplinary appln category
	Ranking in OR & Mgmt Sci category
	Health Systems
	Issues Published
	Pages Published
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