

Quality Maternal and Newborn Care Research Alliance

STRATEGIC PLAN for 2019-2021

(2020-01-22)

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QMNC RESEARCH ALLIANCE STRATEGIC FRAMEWORK FOR 2019-2021

November 2019

WHO WE ARE	We are an alliance of researchers, clinicians, advocates, and policymakers working together to foster and support research to improve quality maternal and newborn care.
OUR VALUES	We envision a world in which equitable and quality maternal and newborn care for all is advanced through the promotion, conduct, and translation of research that underpins optimal quality maternal and newborn care and that examines the integral role of midwifery.
OUR MISSION	To collaborate in global research that promotes, generates, and translates knowledge, particularly of the integral role of midwifery, in order for women, childbearing people, and families to survive, thrive, and transform.
OUR VALUES	In prioritizing and implementing our work, we hold these values, that research meets the following criteria: <ul style="list-style-type: none">• Maximal impact• Answerability• Community involvement• Sustainability• Equity
OUR STRATEGIC RESEARCH PRIORITIES	<ol style="list-style-type: none">1. Midwifery and other care models – Investigate the impact of quality maternal and newborn care, and in particular the contribution of midwifery, on maternal, newborn, and related outcomes across diverse settings.2. Optimizing childbearing physiology – Identify and describe aspects of care that optimize or disturb physiology for all childbearing women and people, and their fetus/newborn/infant.3. Measures and benchmarks – Determine which indicators, measures, and benchmarks are most valuable in assessing quality maternal and newborn care across settings, including the views of those who bear children, and develop new ones to address identified gaps.
OUR CROSSCUTTING PRIORITIES	<ol style="list-style-type: none">1. Expanding research – Catalyze the conduct, translation, and implementation of research that meets the needs and preferences of women, infants, and all families.2. Equity – Apply an equity lens to all Alliance activities, both internally and externally, recognizing that appropriate language and representation will differ according to community and context.

	<ol style="list-style-type: none"> 3. Communication – Establish and maintain a communication plan, including an online platform to serve those working on collective QMNC research aims and activities. 4. Research capacity building – Increase the commitment of organizations and funders to QMNC research, as demonstrated through enhanced investment in relevant research and capacity building.
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OUR INSTITUTIONAL PRIORITIES	<ol style="list-style-type: none"> 1. Terms of Reference – Develop Terms of Reference for the Alliance, including its purpose, membership, governance structure, and participation and decision-making mechanisms. 2. Brand – Develop a branding strategy in support of other strategic priorities of the Alliance. 3. Financial system and fundraising – Establish a financial planning and reporting system and a fundraising strategy for the Alliance for 2019-2021
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1. INTRODUCTION

This strategic plan for mid-2019 through 2021 (2.5 years) will guide the Quality Maternal and Newborn Care (QMNC) Research Alliance (“the Alliance”) as we pursue ambitious initiatives to implement three priority areas of research outlined below. This is the first strategic plan for the Alliance, organized in 2018, and it provides a roadmap to help us make strategic choices about research direction, mobilization of engagement, fundraising, and allocation of the Alliance’s limited human and financial resources. It will guide implementation of our action plans as we seek to collaborate in global research that promotes, generates, and translates knowledge, particularly of the integral role of midwifery, in order for women, childbearing people, and families to survive, thrive, and transform.

With this plan, we are setting the stage for effective collaboration with researchers and other stakeholders (e.g., service users, policy makers, and scholar activists) to make a significant contribution to the provision of optimal quality maternal and newborn care globally.

Based on prior research and collaboration, we have identified **three strategic research priorities**:

1. Investigate the impact of quality maternal and newborn care, and in particular the contribution of midwifery, on maternal, newborn, and related outcomes across diverse settings.
2. Identify and describe aspects of care that optimize or disturb physiology for all childbearing women and people, and their fetus/newborn/infant.
3. Determine which indicators, measures, and benchmarks are most valuable in assessing quality maternal and newborn care across settings, including the views of those who bear children, and develop new ones to address identified gaps.

These research priorities are guided and supported by the following **crosscutting priorities**:

1. **Expanding research** – Catalyze the conduct, translation, and implementation of research that meets the needs and preferences of childbearing women and people, infants, and families.
2. **Equity** – Apply an equity lens to all QMNC Alliance activities, both internally and externally, recognizing that appropriate language and representation will differ according to community and context.
3. **Communication** – Establish and maintain a communication plan, including an online platform to serve those working on collective QMNC Research Alliance aims and activities.
4. **Research Capacity Building** – Increase the commitment of organizations and funders to QMNC research, as demonstrated through enhanced investment in relevant research and capacity building.

To support these priorities, we will establish the Alliance as a formal entity and build our organizational capacity, giving highest attention to **three institutional priorities**:

1. Develop Terms of Reference for the Alliance, including its purpose, membership, governance structure, and participation and decision-making mechanisms.
2. Develop a branding strategy in support of other strategic priorities of the Alliance.
3. Establish a financial planning and reporting system and a fundraising strategy for the Alliance for 2019-2021.

Successful implementation of this plan will enhance our capacity to collaborate effectively with researchers and other stakeholders to achieve the research priorities. It will build on current momentum to strengthen and increase our resources to support the global collaboration we seek. And, it will bring us closer to our aspiration of a world in which equitable and quality maternal and newborn care is available for all.

2. THE STRATEGIC PLANNING CONTEXT

The QMNC Research Alliance is an alliance of researchers, clinicians, advocates, and policymakers working together to foster and support research to improve quality maternal and newborn care. The group developed out of the seminal work published in the 2014 Lancet Series on Midwifery¹ (LSM) (Renfrew et al, 2014; Homer et al, 2014; van Lerberghe, et al, 2014; ten Hoop-Bender, et al, 2014). Figure 1 presents a brief overview of the LSM findings.

¹ <https://www.thelancet.com/series/midwifery>

The 2014 *Lancet* Series on Midwifery in a Nutshell

Papers 2014 & 2016	Methods	Findings and conclusions
1. Midwifery and quality care	Defined midwifery, critical synthesis of quantitative and qualitative evidence, case studies	Could improve 50+ outcomes. Definition and framework for use in planning, monitoring, regulation, education
2. Projected effect of scaling up midwifery	Modelled impact of implementation of midwifery	Universal provision of midwifery (with family planning) as defined in the series could reduce mortality by 80%+
3. Country experience of strengthening health systems through midwifery	Analysis of four country case studies with success in decreasing high maternal mortality	Success r/t quality, respectful care, reducing over-medicalization, midwifery integration & health system access
4. Improvement of MNH through midwifery	Summary, analysis, call to action	Midwifery and midwives crucial to achievement of national and international goals and targets
5. Asking different questions	Analysis and consultation to identify priority research questions	Priorities identified. Requires new programs of research & implementation of known models that work.

A group of LSM authors continued work in collaboration with WHO and international stakeholders to analyze the LSM findings for knowledge gaps and to identify the most important research priorities for moving forward (Kennedy et al, 2018). These are the three **Research Priorities** presented in this plan.

Over the past five years since the initial publication of the LSM and subsequent work on identifying the research priorities, a group of interested researchers and stakeholders gathered informally at various conferences and virtually to continue to collaborate. In 2018, we held a briefing with funders and donors to consider potential strategies for moving forward. At that important meeting we identified the need for more formal planning and establishment of the QMNC Research Alliance. In addition, we focused on the following key areas:

- The need for women, all families, and communities, especially those of color and who bear the highest burden, to drive the research agenda.
- The need to reverse the trend of researchers following the funders rather than the activists.
- The need for strategies to range from explicating models of care at the cellular level to those at the system level.
- The need for a core outcome dataset.
- Emphasis on reducing disparities – understanding institutional racism and toxic stress and how to reverse and promote resilience through QMNC.
- Research that provides transgenerational value.

Formal strategic planning for the Alliance began in 2018 with a retreat held in May 2019 with 20 LSM authors and additional stakeholders in attendance. This strategic plan represents the work

of this group during and since that retreat. The Alliance will be formally launched and available for global engagement in late 2019.

3. VISION, MISSION, AND VALUES

Who We Are

We are an alliance of researchers, clinicians, consumers, advocates, service users, policymakers, and other interested colleagues working together to foster and support research to improve quality maternal and newborn care.

Our Vision

A world in which equitable and quality maternal and newborn care for all is advanced through the promotion, conduct, and translation of research that underpins optimal quality maternal and newborn care and that examines the integral role of midwifery.

Our Mission

To collaborate in global research that promotes, generates, and translates knowledge, particularly of the integral role of midwifery, in order for women, childbearing people, and all families to survive, thrive, and transform lives.

Our Values

The QMNC Research Alliance from its inception used five criteria to rank our research priorities, and we now hold these as core values as we move forward with implementation of this strategic plan. The values are:

Equity: Does the research have the potential to reduce inequities by including those most vulnerable to poor outcomes and/or enhancing the health and well-being of *all* childbearing women and people, and infants, and families?

Maximal impact: Is it likely the research will lead to high quality care for women, infants, and all families; improve the short- and/or long-term physical, social, and emotional health and well-being of women, infants, and all families; and/or have an impact on the broad social conditions of people's lives that influence health and well-being?

Answerability: Can the new knowledge lead to an efficacious intervention or program? Is the research question clear and transparent about process and outcomes and respects ethical principles that protect human rights?

Community* involvement: Does the research have the potential to engage communities about topics important to them and/or include groups that are seldom heard, often excluded, or hard to reach?

Sustainability: Is it likely that there will be adequate resources and commitment to the conduct of the research and/or that the implementation of the research results will be affordable over time in a variety of settings?

*Community includes people, women, infants, girls, families, and the context in which they live, but could also include clinicians, service user groups, policymakers, and others.

4. STRATEGIC RESEARCH PRIORITIES FOR 2019-2021

Using the top three research priorities identified in Kennedy et al. (2018) as a guide, we considered a wide range of research opportunities for 2019-2021 and conceived of strategies for moving forward quickly and decisively with each of these priorities.

Research Priority #1: Investigate quality maternal and newborn care

Investigate the impact of quality maternal and newborn care, and in particular the contribution of midwifery, on maternal, newborn, and related outcomes across diverse settings.

This priority addresses the need for published research that clearly delineates what constitutes best practices for optimal maternal and newborn health outcomes and how those practices overlap with or are reflected in midwifery practice. Initiatives to advance this priority emphasize the creation and dissemination of this research by Alliance membership as well as by researchers at institutions of higher education.

Key initiatives under this research priority are:

1. Achieve two new funded research projects by any Alliance member in collaboration with other members as well as non-members that address this priority and/or its sub-questions as listed in Kennedy et al. (2018). Actions to achieve this initiative are:
 - a. Identify funding opportunities relevant to this priority, and disseminate these opportunities to members via the QMNC Research Alliance website and email list.
 - b. Encourage members to use the Alliance online discussion board to discuss and seek feedback on research ideas for grant applications.
 - c. Identify where collaboration and where competition is appropriate – e.g., in some instances, members may decide to collaborate or apply jointly for grants rather than compete for the same funding opportunities.
2. Advocate to funders to frame two calls for research or to commission two research studies related to this priority. Actions to achieve this initiative are:
 - a. Write one-page summaries of why QMNC is important for funders.
 - b. Identify potential funders for these specific purposes within or in collaboration with the broader fundraising strategy (see Institutional Priority #3).
 - c. Map who in the Alliance is already engaged with which funders.

- d. Strategize who in the Alliance is best placed to influence each funder.
 - e. Submit concept papers and proposals to funders by the end of 2021.
3. Broker two new research partnerships between Alliance members. Actions to achieve this initiative are:
 - a. Create content for the Alliance website, such as blogs or YouTube clips, to raise awareness of research topics related to this priority.
 - b. Facilitate online “speed dating” to help members to link with each other to undertake research activities such as writing papers and grant applications.
 - c. Disseminate information about specific funding opportunities/ research calls.
 - d. Use opportunities of aligned conferences to foster links between Alliance members.
 4. Promote this priority to institutions of higher education as suitable dissertation topics for master’s and doctoral students. Actions to achieve this initiative are:
 - a. Encourage Alliance members to be in communication with their local institutions of higher education in order to initiate and develop relationships supportive to the conduct of research relevant to this priority.
 - b. Identify other appropriate institutions and methods of communication and initiate engagement.
 - c. Offer regional dissertation prize(s) for best dissertation on research topics related to this priority.
 - d. Use existing trips to conferences and meetings to promote research topics related to this priority to institutions and post-graduate students.

Research Priority #2: Optimizing Childbearing Physiology

Identify and describe aspects of care that optimize or disturb physiology for all childbearing women and people, and their fetus/newborn/infant.

This priority seeks to highlight the complex, interacting components of the biopsychosocial milieu that affect physiologic pregnancy, birth, and postpartum periods. These include the individual beliefs, experiences, and knowledge held by the woman giving birth and of their birth companion(s), and care provider(s). It also includes neurobiological factors and impacts, and the nature and impact of the immediate birth environment and setting, as well as the effects of sociocultural, geographic, and economic contexts. The objectives chosen to support this priority underpin both future research by Alliance members, and facilitation of global networks to enable connections between and among researchers in this field.

Key initiatives and 2-year goals under this research priority are:

1. Contribute to the global crosscutting Alliance database and map of researchers, research projects, and protocols on topics related to this priority, and disseminate this information via the Alliance website.² Actions to achieve this initiative are:

² Researches will indicate if material is embargoed.

- a. Collaborate with the Communications work group to implement a registration method on the Alliance website in which researchers, upon joining, indicate research areas and interests.
 - b. Conduct a review of relevant studies on PubMed over the last 5 years to identify authors working in this area.
 - c. Develop and maintain a list of researchers doing relevant work, collaborating with those collecting similar information and drawing from sources such as authors of papers included in Cochrane Reviews, as well as from qualitative and other non-RCT or clinical research areas.
2. Publish a detailed description of physiologic birth. Actions to achieve this initiative are:
- a. Drawing on existing descriptions of physiologic birth, draft a detailed description for Alliance use.
 - b. Circulate, facilitate discussion, refine, and finalize with broad Alliance engagement.
 - c. Publish the description in open-access journals and on Alliance website.
3. Publish and disseminate a guideline on the conduct of research into aspects of care that optimize or disturb healthy childbearing physiology, to include perspectives of participants, description and perspectives of care providers, and description of environment and context in which this research takes place. Actions to achieve this initiative are:
- a. Create a draft that includes perspectives of service users and other stakeholders as well as those of clinicians and that collects data not only on what contributes to poor outcomes, but on what supports and elevates positive physiology of birth.
 - b. Share the draft via Creative Commons or other open-access source to invite feedback and comment on the platform provided by the Alliance website.
 - c. Disseminate the site, invite comments through Alliance networks, and ask for it to be snowballed out from there.
 - d. Encourage and collect comments and debate, creating a crowd-sourced final document that reflects experiences from an extended community.
4. Identify gaps in existing research and prioritize topics to be addressed. Actions to achieve this initiative are:
- a. Create a forum on the Alliance website to allow researchers to upload or link to research that they are involved with or aware of that addresses this research priority.
 - b. Ask participating researchers to identify gaps or topics related to this research priority that they believe need to be investigated more deeply.
 - c. Invite the network of researchers to respond to these identified gaps with research they are aware of that may fulfill the perceived need for additional work.
 - d. Prioritize the topics that remain as gaps, once site traffic stabilizes, suggesting concept saturation.

Research Priority #3: Measures and Benchmarks

Determine which indicators, measures, and benchmarks are most valuable in assessing quality maternal and newborn care across settings, including the views of those who bear children, and develop new ones to address identified gaps.

This priority stems from the observation that most outcomes and instruments currently used in maternal and newborn care research are focused on mortality, morbidity, and short-term assessments; the recognition of the connection between positive maternal and newborn care experiences and clinical outcomes; and the relative lack of representation of the voices and priorities of service users in data on maternal and newborn outcomes and experiences. The focus on pathology and short-term outcomes has excluded an extensive and critical area of outcomes assessment on positive childbearing care and experiences. Objectives within this priority emphasize the development and dissemination of validated tools that will facilitate assessment of these under-examined areas, across disciplines and contexts. Moreover, it is anticipated that the tools will support the Alliance's broader objective to build QMNC research capacity.

Key initiatives under this research priority are:

1. Map existing measurements, indicators, and tools that are relevant to research related to this priority. Actions to achieve this initiative are:
 - a. Secure funding to sustain this initiative by working with QMNC leadership to identify funding sources, creating overall and project-based budgets, and co-developing proposals to apply for those funding opportunities.
 - b. Evaluate the quality of existing tools and identify gaps, then publish results on the Alliance website and disseminate directly to potential funders.
 - c. Develop criteria for use of the repository, including input from Alliance membership as well as external consultation.
 - d. Develop a web-based tool for collection and vetting of new submissions to the repository.
 - e. Disseminate information about the repository and recruit new members and submissions.
2. Develop and disseminate a minimum set of core variables that enable the study of topics related to this priority and the components of QMNC across contexts. Actions to achieve this initiative are:
 - a. Conduct a review of Lancet and other literature to develop the core variables.
 - b. Create the framework/matrix with the minimum set of core variables.
 - c. Disseminate the framework via the Alliance website and otherwise make it accessible to researchers.
3. Upscale the "Decolonizing Research" Brown paper to the QMNC framework and global context. Actions to achieve this initiative are:
 - a. Develop best practices for measurement in line with the equity principles delineated in the QMNC Research Alliance Equity Statement as well as in the Brown paper, acknowledging that assessment of quality must take unconventional measures into

- account such as autonomy, respect, and lived experience, and that these measures may come from unconventional sources or methods.
- b. Publish and disseminate a Code of Conduct or Principles of Best Practice for measurement of these metrics.
4. Develop and share a repository of data registries that can be used to study topics relevant to this priority and QMNC research more broadly. Actions to achieve this initiative are:
 - a. Identify extant datasets and registries from around the world that are relevant to the QMNC framework.
 - b. Create a matrix to compare variables across sources, countries, and contexts.

5. CROSSCUTTING PRIORITIES

The research priorities above will be guided by a set of underpinning and crosscutting priorities that provide a framework for and help ensure the viability of current and future research priorities and initiatives. Moreover, the crosscutting priorities will facilitate integration in Alliance efforts, countering forces that often silo research efforts and promoting synergies.

Crosscutting Priority #1: Expanding research

Catalyze the conduct, translation, and implementation of research that meets the needs and preferences of women, infants, and all families.

This crosscutting priority provides a base from which the Alliance can provide support and guidance members, whether individuals or organizations, as they seek to conduct research on maternal and newborn care by keeping the research community up-to-date on improvements in maternal and newborn care. Further, it will assist in the promotion and dissemination of that research in order to inform the application of research findings through the use of social media and multimedia platforms.

Key initiatives under this crosscutting priority are:

1. Promote and facilitate research by members of the Alliance as well as through partnerships with outside researchers and institutions. Actions to achieve this initiative are:
 - a. Inform the QMNC research community regarding research design to inform scale-up of maternal and newborn care improvements
 - b. Ensure relevant audiences know about the QMNC research guidance recommendations
2. Promote the effective use of research to support improvement in maternal and newborn care and outcomes. Actions to achieve this initiative are:
 - a. Communicate new priority areas as needed through multi-media channels at launch, making clear why there is a case for change

- b. Use third party channels to promote access to relevant recommendations and other information, particularly through syndication (digital) and leaflets and journals (paper)
- c. Utilize social media and other platforms to make research available and accessible to a broad population in order to reach change agents outside of academic contexts.

Crosscutting Priority #2: Equity & Inclusion

Apply an equity lens to all Alliance activities, both internally and externally, recognizing that appropriate language and representation will differ according to community and context.

This crosscutting priority highlights the importance of the application of an equity lens to research, dissemination and advocacy activities conducted by the Alliance and the promotion of equity in all activities conducted by its members or in collaboration with the Alliance. Processes applied for the implementation of this priority guide researchers in the use of appropriate language across various contexts and cultures.

Key initiatives under this crosscutting priority are:

1. Create and maintain an internal framework to guide how we frame and write our research and other communications to be inclusive across a variety of cultures and contexts. Actions to achieve this initiative are:
 - a. Create a process to validate equity as a core value of the Alliance, and adopt a working definition of equity that will be used to guide Alliance activities
 - b. Create an internal framework to guide, support, and maintain this value in the work we do as an alliance, including developing a system to maintain accountability to this value through monitoring of and feedback on Alliance work and publications. This may include creating indicators that capture adherence to the values that we aspire to, recommend, and endorse, and collecting data in order to evaluate compliance and efficacy. It can also include seeking to record how much our framework is used in new literature to mark whether or how much it has been taken up by researchers and become part of the larger body of knowledge.
 - c. Apply an equity lens in the design and conduct of research by the Alliance as well as that done in collaboration with other organizations.
 - d. Promote the application of an equity lens in the design and conduct of research by the Alliance members as well as that done in collaboration with other organizations.

2. Maintain an external public statement regarding our use of equitable language within the Alliance website and publications. Actions to achieve this initiative are:
 - a. Draft a concise public statement, using the internal framework as a foundation, explaining our dedication to equity in our language and our research.
 - b. Use this statement to maintain transparency to the public about what we do, what we believe, and how we hold ourselves accountable to our professed values, by communicating our processes, procedures, and the results of our monitoring process.

3. Develop our internal capacity to live this ideal and to support others in doing so through the use of trainings, orientations, and ongoing educational opportunities as well as through compiling of resources. Actions to achieve this initiative are:
 - a. Organize and convene one or more orientations to the internal equity guide in order to introduce the framework and establish expectations for Alliance-related work.
 - b. Utilize the convergence of Alliance members at conferences or other gatherings to periodically offer ongoing training and educational opportunities in order to maintain best practices and update membership on evolving language.
 - c. Compile resources that will support the use of the equity lens in research promoted by the Alliance and make it available through our online platforms.

Crosscutting Priority #3: Communication

Establish and maintain a communication plan, including an online platform to serve those working on collective QMNC research aims and activities.

This crosscutting priority addresses the need for a strategy to guide QMNC communications with a number of stakeholders, including researchers, funders, and service users, among others. The QMNC Research Alliance website will serve as a home base for Alliance membership as well as a source of information for various users, while the broader communications strategy will work to ensure that the tools and channels used are appropriate and in alignment with the intended message and target audience.

Key initiatives under this crosscutting priority are:

1. Create and maintain a website with up-to-date information on current and recent research relating to Alliance priorities.
Actions to achieve this initiative are
 - a. Hire a web designer to build, design, and launch the Alliance website.
 - b. Work with the web designer to train one or more Alliance administrators to maintain and update website.
 - c. Develop a system by which Alliance members submit publications or other work related to Alliance priorities and initiatives.
2. Maintain a database of active researchers, funders, and institutions who work on or support work relating to Alliance priorities.
Actions to achieve this initiative are
 - a. Develop database and populate with relevant member registration information for individuals and organizations.
 - b. Update database regularly by importing information from new members as well as removing inactive members or those no longer working on research relevant to QMNC interests.

3. Develop a communications strategy to guide Alliance interactions with various groups and to serve those working on collective QMNC research aims.
 - a. Identify categories of individuals and organizations with whom the Alliance will be in communication, such as funders, institutions of higher education and individual researchers, clinicians, and service users.
 - b. In close collaboration with Alliance research working groups, determine one or more key messages that directly support the Alliance’s research priorities and that the Alliance would like to send to parties in each category mentioned in (a.)
 - c. Develop tools appropriate to the messages and intended recipients mentioned in (a.) and (b.), e.g., white papers, fact sheets, press releases, or other materials based on target group and the message to be conveyed.
 - d. Identify and develop channels for communicating these messages, including direct advocacy, the Alliance website, and social media.

Crosscutting Priority #4: Research investment

Increase the commitment of organizations and funders to QMNC research, as demonstrated through enhanced investment in relevant research and capacity building.

This priority emphasizes the need to promote knowledge and awareness among organizations and funders regarding why this approach matters to any effort to improve clinical and experiential outcomes for birthing individuals and their babies. Further, the heightened awareness of the impact of this approach must be coupled with increased commitment of funders and other institutions that have the ability to increase the capacity of researchers to pursue these topics. Under this priority the Alliance will seek to facilitate learning and understanding by organizations and funders regarding QMNC in order to increase funding and capacity relevant to the work.

Key initiatives under this research priority are:

1. Develop and agree upon the Alliance’s role in enhancing investment in relevant research and capacity building
2. Develop a strategy to reach out to and build relationships with institutions of higher education to support and enhance capacity building. Actions to achieve this initiative are:
 - a. Determine what relationships are already in place between QMNC membership and institutes of higher education.
 - b. Determine how best to achieve this priority – for example, through efforts to reform curricula, through holding knowledge sharing events, or through a function on the Alliance website.
3. Develop a strategy to build relationships with funders and mobilize them to support QMNC research broadly. Actions to achieve this initiative are:
 - a. Prioritize the donors that the Alliance wants to influence.

- b. Update and develop visual aids and other materials for demonstration at briefings and for distribution to funders.
- c. Develop and send to funders white papers that illustrate the current body of knowledge and demonstrate the intersections of Alliance priorities with funders' missions and goals.
- d. Convene one or more funders' briefings in 2020 for U.S.-based and international funders, addressing the intersections and divergences of priorities between them.

6. INSTITUTIONAL PRIORITIES FOR 2019-2021

Organized in 2018, the Alliance will establish itself as a formal entity during this first planning period. By the end of 2021, we anticipate having in place the governance policies and operating structures required for effective engagement of increasing numbers of researchers and smooth facilitation of expanding collaborative action.

The Alliance has its home in space generously contributed by the Yale School of Nursing, though all other work must be supported by external funding. Institutional strategies are stratified by priority and long-term effect in order to make the best use of any funding secured. A funding level of \$10,000 will go towards the first stratum of these goals, including Institutional Priorities #1 and #2. A funding level of \$15,000-20,000 would make Priority #3 possible. Thus, in support of our research priorities for 2019-2021 and to ensure a strong foundation that will prepare the Alliance to continue working over the long term – five years and beyond – we will prioritize these three institutional efforts.

Institutional Priority #1: Develop Terms of Reference

Develop Terms of Reference for the Alliance, including its purpose, membership, governance structure, and participation and decision-making mechanisms.

Terms of Reference (TOR) will be drafted and approved early in the strategic planning period to ensure that Alliance leadership and members are working with a shared understanding of the purpose and function of the organization. The elements of the TOR will be composed through a participatory process and will take into account that the Alliance works across regional, cultural, linguistic, and other borders or contexts.

Key initiatives under this institutional priority are:

1. Develop a draft TOR that lays out the form and manner in which the Alliance will operate and regulate itself.
2. Seek feedback and final approval from the Alliance membership.
3. Disseminate the Alliance's TOR and make it publicly available.

Institutional Priority #2: Develop a brand for our Alliance

Develop a branding strategy in support of other strategic priorities of the Alliance.

Of critical importance to the future of the Alliance is establishing a distinct brand that enhances organizational cohesion, promotes recognition and increases the Alliance's influence, contributes to fundraising efforts, and supports the Alliance's mission in other ways. A tranche of the first \$10,000 of funding will go towards hiring graphic and web designers to develop a brand for the Alliance and to establish an online presence for it (see Crosscutting Priority #3 – Communications).

Key initiatives under this institutional priority are:

1. Trademark the name of the Alliance.
2. Design branding for the Alliance and disseminate for use.
3. Develop a branded online presence for the Alliance.

Institutional Priority #3: Establish a financial system and a fundraising strategy
Establish a financial planning and reporting system and a fundraising strategy for the Alliance for 2019-2021.

As part of its institutional development, the Alliance will develop its financial management system and establish norms for fundraising (see Crosscutting Priority #4). As a first step, the Alliance will create a financial planning and reporting system that the leadership will use for monitoring and decision-making purposes. A \$15,000-\$20,000 budget would enable the Alliance to determine a financial plan for long-term funding and financial management and to develop materials that will support the attainment of such a plan.

Key initiatives under this institutional priority are:

1. Establish a financial planning and reporting system for the Alliance. Actions to achieve this initiative are:
 - a. Develop projected revenue and expense flows, assumptions about the internal and external environment upon which the financial scenario rests, and the Alliance's approach to financial risk management
 - b. Establish a system for closely monitoring budget vs. actual expenditures and tracking external trends
 - c. Produce and disseminate quarterly financial reports showing income sources and amounts, as well as line-item expenses of the Alliance's operations.
 - d. Use the information in financial reports to make timely adjustments to initiatives and operations
2. Develop a fundraising strategy tailored to specific Research Priorities and Initiatives as well as for the Alliance broadly. Actions to achieve this initiative are:
 - a. Develop a policy and protocols for deciding from whom the Alliance will receive funds, adhering to our stated values.
 - b. Agree on protocols related to Alliance fundraising, e.g., for how decisions will be made about fiscal agents, principal investigators, the flow of funding, the endorsement or

sponsorship of the Alliance for collective applications for funding. Set guiding values for those protocols, e.g., the values of promoting equity, democratization, and capacity building.

- c. Create a fundraising strategy and assign leaders to each area or task.
- d. Nurture relationships with funders who attended the briefing in 2018 and court new donors through communication about how Alliance research and priorities intersect with the vision and values of the funder.
- e. Collectively pursue significant grant funding from a large foundation that is compatible with the mission of the Alliance broadly.
- f. Develop core descriptions of research aims and budgets to use for multiple grant submissions as well as in materials for distribution to potential donors.

7. MONITORING PROGRESS AGAINST 2019-2021 GOALS

We acknowledge that attribution will be a challenge in assessing the influence and impact of the QMNC Research Alliance and the implementation of this strategic plan. We will take care in how we collect and report on data showing progress against our benchmarks. We will need to conduct polling among our membership, and perhaps beyond, to help identify inspiration from and attribution to the Alliance. We will want to go beyond peer-reviewed published literature to also track our influence through other forms of disseminating research findings, including social media.

We include benchmarks in this strategic plan for our three sets of strategic priorities. We will seek baseline information for each and set up tracking and monitoring systems. We will adjust the benchmarks during the first part of the planning period as we learn what information best serves the Alliance in understanding progress against our goals and in making decision.

In this first short planning period – through 2021 – we may not be able to track other measures of impact that we would want to monitor in the future. Examples are accomplishments in shifting program priorities and changing policies.

Research benchmarks

- increase in unique visitors to the Alliance website
- increase in number of Alliance members (individuals and organizations)
- increase in diversity of Alliance membership in categories such as areas of expertise and geographical spread
- # of relevant tools made available via the Alliance, including the QMNC framework, and degree of uptake in their use by researchers and others

Benchmarks for crosscutting priorities

- # of Alliance-related research findings translated and implemented
- increase in research outputs relevant and accessible to the Global South

- # of references to the QMNC Research Alliance Equity Statement in the literature
- increase in page hits in the Alliance website’s database of active researchers, funders, institutions
- increase in downloaded articles from the Alliance website

Institutional benchmarks

- Degree of fulfillment of and compliance with the Alliance’s full Terms of Reference
- % of Alliance work groups that are actively moving forward with approved work plans
- increase in Alliance member participation
- increase in annual funding to the Alliance’s core functions

Strategic reviews

This strategic plan will shape and guide the Alliance’s accomplishments through the conclusion of 2021. It provides a clear framework for the launch of this collaborative effort and will tap a gamut of opportunities to change the landscape for global research that promotes, generates, and translates knowledge, particularly of the integral role of midwifery.

On an annual basis prior to operational planning for the next year, the Alliance will conduct a strategic review in which we will assess progress on the benchmarks. Based on the results of that review and a check on changes in our operating environment, we will make course corrections as required to maintain a relevant and ambitious plan, as we strive to make it possible for all women and childbearing families to survive, thrive, and transform.

Appendix 1. Illustrative Quarterly Plan Template

Name of subcommittee or working group	Period for this plan (quarter)	Name of person submitting the report and date submitted
Priority XX Leaders:		Name: Date:
Last Quarter’s Priorities	Accomplishments/Status	Next Quarter’s Priorities
•	•	•

Appendix 2. Illustrative Fundraising Strategy Template

Potential Donor	Existing Relationship	Potential with that donor	Strategy for moving forward	Point Person(s)