Strategic Plan
YEARS 2023 - 2025
Chris Herren

Herren Project began this first strategic plan ten years after being founded by former professional basketball player Chris Herren, who has been in long-term recovery since 2008. Chris was grateful for the gift of treatment given to him and wanted to pass it along to other people who were struggling. He also began sharing his personal story with schools and communities nationwide in hopes of changing the conversation around substance use. His example and inspiration have prompted many more people, individuals, and families, to reach out for help with their struggles with addiction and has empowered communities nationwide to come together to help prevent the disease of addiction. Chris founded the nonprofit Herren Project to provide a consistent, effective response to these calls for help.

We are proud that Chris gave us our name and our mission. Today, Chris is fully occupied as the CEO of two independent for-profit businesses – Herren Talks and Herren Wellness. Through Herren Talks, he talks to audiences large and small around the United States, creating a conversation around the first day of addiction. Herren Wellness is a holistic, in-patient recovery center for people entering recovery from addiction and other mental health disorders in Massachusetts and Virginia. Chris has no staff or Board responsibilities at Herren Project, and we have no institutional relationship with either of his for-profit enterprises. Chris continues to be our valued friend, trusted founding advisor, and our inspiration.
Our Journey

2011 - 2022

Chris’s philosophy of walking with people from wherever they are in their recovery journey has also guided our journey as an organization since 2011. From our beginning, we have helped thousands of people in acute crisis take their first steps in recovery by assisting them in finding high-quality, in-patient treatment facilities and, when needed, providing in-kind treatment scholarships. Seven-week “recovery scholarships” were added to give professional post-treatment coaching, recovery plans, and recovery housing rent to help people transition from treatment to long-term sobriety. Addiction is a family disease. One-on-one phone consultations and online support groups were added as resources for the families affected by substance use disorder. Families are a vital piece to an individual’s recovery and need support to recover from the broader impacts of this cruel disease.

Community and connection are key success markers to long-term recovery. Our alumni communities and Team Herren Project fundraising community strengthen recovery and bring positive awareness to break the stigma.

Along with treatment and recovery supports, prevention is an essential factor in overcoming the disease of addiction and empowering youth to live healthy lives substance-free. Herren Project Clubs, our youth prevention and wellness program, was launched to meet this need.

Inspiration, ingenuity, and a powerful commitment to our mission have enabled us to develop a growing, multi-faceted organization during our first ten years. Now, our very success requires that we take a clear look at where we are now and where the world needs us to be.
In May of 2021, we began strategic planning with an online survey of our Board members, staff, and long-time associate counselors. In June, we held a Board-staff retreat to confirm and refine the survey findings. Throughout August and September, the strategic planning committee conducted interviews with key community organizations and influencers in the addiction field to better understand the value Herren project could bring to the space. Another Board-staff retreat was held in November to review our planning team’s program goals and strategies. The team then worked on what program resources would be needed and how the organization will need to change. A rough draft of the plan was presented to the Board in January of 2022. A final version will be considered for approval in the first quarter of 2022.

Herren Project 2022 Program Areas & Services

**Individuals**
- Helpline
- Treatment navigation, placement, and scholarships
- Recovery housing and coaching scholarships
- Alumni groups (MA, FL, SC)
- Private alumni Facebook group
- Online recovery groups
- Client Betterment Fund

**Families**
- Helpline
- One-on-one 15-minute phone consultations
- Online support groups
- Family support Facebook group
- Webinars
- Lunch and Learn

**Youth**
- Herren Project Clubs
- Wellness Week with Herren
- Youth Ambassadors
- Youth Podcast
- Inspire Youth Conference
- Scholarships

**Community Outreach & Education**
- Team Herren Project fundraising community
- Wellness Week with Herren
- Herren Project Ambassadors
- Recovery Month
- Substance-Free Grants
Rates of substance use disorder and overdose deaths remain high and continue a long-term upward trend.

American youth are facing a longstanding mental health crisis that COVID has intensified. Drug and alcohol misuse among adolescents remain of concern.

Available and affordable recovery services fall short of the need. Millions of Americans cannot access affordable treatment and recovery programs when they need them.

The stresses of the COVID-19 pandemic have only increased the need for all of our services.

Our culture encourages substance use and overuse, yet it casts shame and stigma on those who fall into substance use disorders.

The overall response to addiction is based on a medical model that focuses on short-term treatment with medication and undervalues the power and importance of non-medical supports over the long term, particularly social bonds, supportive communities, and empowered families.

American youth are facing a longstanding mental health crisis that COVID has intensified. Drug and alcohol misuse among adolescents remain of concern.

Research confirms that a robust continuum of care and family and social support networks from short-term acute treatments through long-term maintenance (e.g., five years of tapering support) is critical to long-term recovery. However, insurance rules and medical systems are not organized to provide that continuum of care over the long term.
Current Environment

Our Strengths

We have one of the only free support programs for families of people with substance use disorders.

An asset-based wellness approach connects our supports for recovery to our programs for prevention.

Team Herren Project, our unique fundraising community based around active, athletic events, has the potential to give us literal “feet on the ground” in nearly any US community.

Our evidence-inspired wellness club curriculum for teens meets an urgent need for social-emotional supports at schools and youth-serving organizations in the wake of the COVID pandemic.

We have a unique “recovery community” of Board, staff, associates, volunteers, program participants, and alumni linked by shared experiences and a commitment to helping others get well and stay well.

We have a strong reputation and GuideStar Platinum rating for transparency.

All of our services are provided at no cost to participants, eliminating a critical barrier to recovery services.

Most of our services are provided remotely, making their expansion relatively straightforward and inexpensive.

We excel in supporting recovery through the transition from in-patient care to independent living, typically from day 30 to day 90 of recovery.
### Current Environment

#### Challenges & Constraints

| We are not well known beyond New England and a few areas with established referral partners. |
| We have grown to the point where we need to establish formal policies on program commitments and internal processes. |
| The growth of recovery and family services may also be limited by the number of trained counselors and coaches available as consultants. |
| Our primary intake process for recovery services limits the number of individuals who can access our long-term recovery supports without first being referred for treatment by our team. |
| Our growth is directly linked by our ability to generate philanthropic resources. |
| More formal and comprehensive evidence of program effectiveness will increase our ability to engage funders and program partners. |
| As we get more calls from around the US, our recovery team needs to spend much more time researching state insurance systems and local recovery resources in unfamiliar areas. |
Our Opportunities

Individuals, families, and communities in need reached out to Herren Project in record numbers in 2021.

- Individual and family inquiries rose by 528%.
- Individual treatment placements increased by 92%.
- Participation in online family support groups grew by 92%.
- Registration for Herren Project Clubs prevention program rose by 60%.

Herren Project contributions are poised for continued growth.

- All contributions rose by 47% over two years. (FY 2019-2021)
- General campaign donations doubled with a dedicated Development office in place.
- Team Herren Project success has resulted in a higher profile and expanded access to top charitable events.
Our 3 Strategic Commitments Through 2025

01
Pursue program growth with community impact strategies, collaborative partnerships and diversity initiatives.

02
Double the number of people participating in each of our programs.

03
Position the organization for transformational growth.
Our Plan in Brief

Key Strategies

Community Impact
Prioritize our focus on program growth in selected US target areas to build strong local partnerships and amplify our impact on community wellness.

Collaborative Partnerships
Develop effective partnerships with recovery service providers, schools, youth-serving organizations, and many others to achieve our goals for program growth, racial equity, and community impact.

Diversity, Equity, and Inclusion
Set and achieve goals aligned with the National Culturally and Linguistic Appropriate Services (CLAS) standards for healthcare organizations for inclusion at the staff, Board, and program level.

Leverage partners to reach minority communities such as Boys and Girls Clubs to diversify youth participation and community-based referral partners to bring our recovery services to underserved people.

Program Goals

Individuals
Double our investment in post-treatment, long-term recovery supports for individuals – counseling, sober housing scholarships, online peer support, and increased alumni engagement to extend time in care and duration of sobriety.

Families
Double our services for families, including one-on-one counseling, online peer groups, and grief supports.

Youth Wellness & Substance Use Prevention
Double the number of youth participating in our Herren Project Clubs wellness curriculum through school-based groups and partnerships with the Boys and Girls Club or other youth-serving partners.

Institutional Strengthening

Program Evaluation
Measure and improve our impact through dedicated performance management, evaluation, and learning (PMEL).

Revenue Enhancement
Measure and improve net revenue for each fundraising activity. Invest in activities with the highest ROI.

Cost Center Budgeting
Reorganize our budgeting to allocate costs and revenues to functional activities and delegate budget authority and responsibility to team leaders.

Capacity Investments
Add the administrative capacity in finance and human resources to manage a larger organization effectively.
Vision

Our vision is a stronger, more resilient, and connected community where all people thrive free of the effects of the disease of addiction.

Mission


Herren Project helps individuals and families to live healthy, fulfilling lives by preventing substance misuse, celebrating recovery, and creating resilient communities.

Values

- We believe addiction is a pervasive, destructive, and preventable disease. Together we are stronger in the fight.
- We believe everyone deserves to live a healthy, fulfilling life free from the effects of addiction.
- We believe with the proper support, inspiration, and tools for healthy living, recovery and wellness are possible for people of all ages.
- We meet all people wherever they are in their journeys of recovery and wellness.
- We support all pathways to recovery.
- We value diversity, inclusion, and equity for all.
- We believe connection is the most essential factor in the prevention of and recovery from addiction.
- We are committed to walking with each individual and family on their journey to recovery from addiction.
- We are committed to providing resources, guidance, and support for individuals and families to receive the quality care they deserve, regardless of their resources.
- We strive to strengthen families and build communities that protect and support healthy living.
- We believe one person’s story can inspire another and create a ripple effect for positive change.
- We serve all populations nationwide to build stronger communities, overcome and destigmatize the disease of addiction and prevent substance misuse.
Program Goals

Individual Recovery & Wellness

Goal
Double the number of Herren Project clients who sustain recovery for 90 days and the number who sustain recovery for one year.

<table>
<thead>
<tr>
<th>Opportunity</th>
<th>Strategy</th>
<th>Outcomes</th>
<th>Capacity Needs</th>
</tr>
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| Our strength in post-inpatient recovery counseling and support can help many more people to sustain long-term recovery. | Sustain current levels of referral and scholarship for in-patient care.  
Expand access to Herren Project post-treatment services and increase our efforts to keep alumni engaged with Herren Project beyond 90 days of recovery. | About 420 people in crisis are helped to find and pay for high-quality, in-patient SUD treatment each year.  
The number of people supported with post-treatment sober living scholarships increases by 50 clients per year, from 150 to 300 per year by year three.  
50% of Herren Project recovery alumni remain engaged in the Herren Project community for one year by year three. | Business development manager  
Alumni engagement manager  
Additional coaches and counselors.                                                                 |
Program Goals

Family Recovery & Wellness

Goal
Double the number of families empowered to respond effectively to the Substance Use Disorder of a loved one.

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<td>Participation in our online family counseling peer groups has doubled in a single year. With our help, many more families can learn the self-care and coping strategies they need to support a loved one with SUD effectively.</td>
<td>Grow our family support counseling and online support groups.</td>
<td>Weekly online family and grief support groups increase from 20 to 40 per year. The number of people participating in online family support groups grows from 1,848 to 3,000 per year.</td>
<td>Full-time family services director. Additional counselors to provide consultations and groups. More materials/kits</td>
</tr>
</tbody>
</table>
**Program Goals**

**Youth Wellness & Substance Misuse Prevention**

**Goal**
Double the number of youths participating in evidence-based prevention programs at schools and partner organizations.

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<td>In response to the acute crisis in youth mental wellness, schools and youth-serving organizations have sought out our evidence-inspired wellness curriculum and programming. Partnerships with other organizations already serving youth of color create opportunities to reach the youth most in need of our programs.</td>
<td>Build our capacity and partnerships to support and maintain active, evidence-based, and effective prevention programs serving ethnically and economically diverse teens across the United States.</td>
<td>All recognized school-based Herren Project Clubs meet high standards. Herren Project Club programs are proven to be evidence-based and effective. We provide prevention programs for youth via partnerships with other youth-serving organizations at ten or more locations. Double the number of recognized school-based Herren Project Clubs.</td>
<td>1 to 3 new coordinators to establish and support new school-based and partner-based Clubs. Ongoing, rigorous program evaluation and development (external or on staff). Partnership program manager. Travel, meetings, conferences. More materials.</td>
</tr>
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# Fundraising Goals

## Team Herren Project

### Goal
Grow net income and engage our community in more active support for program services.

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<td>Team Herren Project has strong potential to expand active peer-based fundraising and achieve higher net returns after costs.</td>
<td>Increase event management capacity. Explore new event types. Measure and improve net event and program revenue.</td>
<td>A wider network of peer fundraiser relationships. Potential to replicate our strong running community with other activities. Higher net revenue – see revenue projections.</td>
<td>Trained volunteers to manage some events. On staff program assistant.</td>
</tr>
<tr>
<td>The Team Herren Project model of a wellness community could help support our recovery and family service participants and alumni in their recoveries.</td>
<td>Work with the Recovery Team to create an alumni engagement plan modeled on or engages with Team Herren Project.</td>
<td>Recovery services alumni remain engaged with a community that supports their long-term recovery.</td>
<td>None.</td>
</tr>
<tr>
<td>Team Herren Project’s success relies on critical relationships and experience with event partners and others.</td>
<td>Ensure that key relationships will be preserved in the future through succession planning.</td>
<td>Key Team HP partners and participants will have at least two points of contact with Herren Project staff or Board.</td>
<td>None.</td>
</tr>
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</table>
**Goal**
Grow net resources available for program services by 15% to 20% per year.

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| Fundraising revenue from direct public response grew by 50% from FY 10 to FY21. | Invest more in direct response. | See revenue projections. | Development Director (position posted)  
Development data coordinator/analyst |
| Donor file analysis shows strong potential to raise higher-value gifts through face-to-face fundraising. | Invest in personal fundraising to high net worth prospects. | See revenue projections. | Major gift officer position |
| Analysis suggests that we can increase net revenue from corporations without a parallel fee-for-service program. | Redesign the Corporate Recovery & Wellness Program (CRWP) and combine with new major gift and grants program. | Reduce duplicate services and administration for the program team.  
Maintain our promise of free service to all.  
See revenue projections. | Assign to major gift program.  
Consider added staff as justified by results. |
| A grants and performance data manager will increase our grant income while building our ability to establish evidence of effective program outcomes. | Create a dedicated position responsible for grant solicitation and management, including administration, performance measurement and reporting. | Ongoing performance outcome measurements.  
Evidence-based program guidance and improvements.  
Improved program outcomes.  
Higher grants revenue. | Grants/PMEL manager. |
Institutional Goals

Capacity Building

Goal

Build the institutional capacity to support and sustain a program capable of helping many more people.

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<td>A larger organization will need more administrative support for financial management, human resources, etc.</td>
<td>Invest in financial management and human resources as we grow.</td>
<td>Program and development tasks are re-assigned from the administration to the responsible managers. Administrator has a more focused and interrelated set of responsibilities, including HR, financial management, equipment, facilities.</td>
<td>See Development capacity needs. In-house bookkeeping staff. Specialized administrators for financial management, human resources, and other areas as the organization grows. New Grants Manager/PMEL position (see Development, above)</td>
</tr>
<tr>
<td>More efficient administration will clarify management and budgetary responsibilities.</td>
<td>Develop cost centers aligned to management responsibilities. Assign tasks and budgets within functional areas</td>
<td>Budgetary and management authority will align more clearly with responsibilities and desired outcomes. We will have better, more detailed, and current information on each activity's gross and net cost or revenue.</td>
<td>Financial manager/CFO</td>
</tr>
</tbody>
</table>
To grow our program impact, we need more people, including staff and consultants (many of our counselors are consultants.)

Herren Project’s income from philanthropy has grown rapidly since investing resources in a structured development program in 2018. We believe projected growth of 15% to 20% seems likely based on past performance and in light of our plans to grow our fundraising capacity. We project sufficient growth to add between 3 and 6 FTEs per year over the next three years.
## Moderate Growth | 15% per year

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
<th>2024</th>
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<tbody>
<tr>
<td>Total Public Support</td>
<td>$1,226,070</td>
<td>$1,514,097</td>
<td>$1,731,892</td>
<td>$2,045,000</td>
<td>$2,351,750</td>
<td>$2,704,513</td>
<td>$3,110,189</td>
</tr>
<tr>
<td>Gain from Prior Year</td>
<td>$288,027</td>
<td>$217,795</td>
<td>$313,108</td>
<td>$306,750</td>
<td>$352,763</td>
<td>$405,677</td>
<td></td>
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<tr>
<td>Growth Rate from Prior Year</td>
<td>19%</td>
<td>13%</td>
<td>18%</td>
<td>15%</td>
<td>15%</td>
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<tr>
<td>Additional Income Year to Year</td>
<td>$288,027</td>
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*Actual | Budgeted | Projected*

## Accelerated Growth | 20% per year

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