Introduction

In pursuing our vision of a world in which no one impacted by breast cancer feels uninformed or alone, LBBC continues to set its sights on connecting more and more people with our brand of trusted information and a community of support. In order to achieve our ambitious growth objective (illustrated as the intention to keep pace with the growing prevalence of breast cancer) we elected to reimagine how we work and transform how we serve the needs of our community. This memo offers an historical record of the decisions that emerged from the broad and deep processes LBBC undertook to pursue its operational evolution.

In 2017, LBBC staff and board committed to a holistic process that looked at how we serve our community and achieve our mission. Over the subsequent months, the LBBC Board and Staff participated in a series of activities that have informed and inspired the goals we set for our 2019-2022 Strategic and Operational Plan. Through this work we reaffirmed the values and vision that have been at the heart of LBBC to date, while creating a new model that embraces our understanding and engagement of our community. We began by reasserting our commitment to our Vision and Mission Statements and then incorporated the growing body of knowledge and direction we drew from our in-depth analysis of our work, which we termed the Strategic Focus Project. As part of this process we also initiated a Content and Brand Platform project. The result of all of this work led us to a concise set of robust goals and objectives built upon the strategic priorities set by the Board, vetted by the staff, and then translated into tactics that are both ambitious and achievable.

We took several discrete steps to produce a comprehensive, integrated plan:

- The Strategic Planning Committee, with members from the LRPC and staff leadership, established the commitments and context, gathered and incorporated staff and board feedback, and framed the high-level strategic goals for Board approval (Summer 2018 -- January 2019)

- The Strategic Planning project went on hiatus (February 2019 – July 2019) while the staff focused on refining and interpreting the implications of the work on the Strategic Focus Project to clarify a new set of strategic marketing (patient focused) imperatives, Brand and Content work to define LBBC’s content strategy, branding, and voice, and Organizational Dynamic work to address the organizational and structural changes necessitated by these implications from these initiatives.
Senior Leadership Team revisited, clarified, and revised the Board-approved strategic goals and developed specific objectives and metrics to operationalize them (June – August 2019).

Commitments and Context

During the summer of 2018, the Long-Range Planning Committee decided to develop a multi-year strategic plan for LBBC that would

- Build upon the strategic marketing plan initiative,
- Identify additional strategic imperatives, and
- Provide focus for investments in organizational capabilities.

The planning effort leveraged the outcomes from the current strategic plan and Strategic Focus Project as well as a number of staff-identified organizational opportunities and challenges. The LRPC Leadership defined a five-step process to lead the Board of Directors and the Staff through the planning activities, allowing members of the LRPC and key staff to lead the work of developing the details of the plan.

The Strategic Planning Committee agreed to four key decisions that express who we are and the how we intend to grow. We set these as long-term ambitions, knowing that specific goals and metrics would be defined to address the current planning cycle to be achievable and pragmatic.

1) Re-confirming the relevance and suitability of the LBBC Mission and Vision
2) Committing to growth and engagement
3) Committing to continue to serve the underserved
4) Aspiring to grow at or above the rate of prevalence of breast cancer

Framing the work was the strategic choice to grow; that is, in recognizing that there is an ever-increasing need for what we do and that we, in fact, do it the best, LBBC would best be able to serve this growing need by growing as organization.

What emerged from this work was a set of strategic goals and sequential steps to achieve 2022 endpoints:

- 2019 is a year of contemplation, decision-making, and planning allowing LBBC to continue to offer programs and events while clarifying and aligning around key definitions, building and implementing select new capabilities, and establishing baseline measures,

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1 When defining underserved, we initially considered a traditional social work definition (i.e., low income), medically underserved, unreached, and also considered our approach to diversity and inclusion.
2 See Appendix A
• 2020 is a year of building, implementing, testing, and beginning to grow new capabilities where possible,
• 2021 is the first full year of operation with all of our new capabilities, dynamics, and goals expected to be achieved, and
• 2022 (and beyond for a period) reflect the same strategic goals for which more specific robust operational goals and metrics will be set.

**Key Decisions made that underpin the Strategic Plan**

LBBC will position itself as a “Psychosocial-Strong” organization, leveraging its highly credible medical information to differentiate itself from competitors on psychosocial issues.

LBBC will position itself as a High-Touch organization, striving to ensure every constituent feels compassion, personalization, interaction and connection in each in-person and virtual offering, creating a more meaningful experience for women.

LBBC will target its audience through the lenses of stage of cancer and Phase in Journey, rather than demographic characteristics.

LBBC will explore the opportunity for deeper relationships with HCPs to support goals of engaging women earlier in the Journey.

Engaging women earlier in the Journey (first 3 months) will be a key focal area for organizational growth in reach.

LBBC will strive towards reach, but also towards greater depth of engagement by increasing the number and diversity of touchpoints with its constituents.

LBBC will elevate the lived experience for people living with breast cancer.

LBBC will continue to develop resources that can restore agency to people whose lives are upended and whose sense of self has been fundamentally altered.
Shared Vocabulary

A shared vocabulary is a critical component for any high-functioning organization. It is the innate, communal understanding about what certain words or phrases mean so that everyone in the organization understands the critical terms clearly and without exception. Having collected input and perspectives from the staff, the leadership team met for a facilitated session to define and align around terms that had begun to appear in LBBC strategic planning work and which required clarification and definition.

- Meaningful engagement
- Underserved
- Voice of people diagnosed with breast cancer
- Lived experience
- Expertise
- Ambassadors
- Program areas
- Loyalty
- Circles
- Goals
- Strategies
- Objectives
- Metrics
- Targets
- Tactics

Meaningful engagement – Engagement is our ongoing, mutually beneficial relationship with people diagnosed with breast cancer. It includes all of the ways in which they interact with, contribute to, and build upon our content, programs, events, and outreach. (Note: we decided to eliminate the word “meaningful”, believing it puts a burdensome and unnecessary requirement on the nature of the engagements).

Underserved – LBBC’s “commitment to the underserved” is a value that, for this plan, is operationalized by focusing on growing our reach to, and engagement with, low-income and newly diagnosed, low-income women.

Voice of people diagnosed with breast cancer - LBBC elevates the voice of people diagnosed with breast cancer through their contributions to content and leadership.

Lived experience – Lived Experience describes the individual and collective perspectives and accounts of people living with breast cancer, as represented by the voicing and valuing of their individual stories and learnings. LBBC has always valued, honored and elevated each individual’s experience with breast cancer.

Expertise – “Our expertise” reflects the knowledge we draw from – and contribute to – the lived experience of people diagnosed with breast cancer, as well as scientifically derived, rigorously vetted data. The trust that others place in LBBC derives from our ability to confidently and accurately translate between the two.

Ambassadors – Ambassadors are individuals who are not LBBC employees but are trained or otherwise qualified to represent and/or speak on behalf of LBBC

Program Areas – Agreed that it’s important that staff members across all departments see themselves and their contributions in the Strategic Plan.
Loyalty – We identified as having engaged community members as a key goal that drives the strategic plan. Loyalty can be measured through engagement with LBBC. This means that someone utilizes at least three pieces of LBBC content in a year, including program participation, participation in fund raising events or campaigns.

Circles – While this concept was identified in initial discussions, for this planning cycle, we have made the strategic choice to focus upon (i.e., dedicate resources to reaching and engaging with) the individual diagnosed with breast cancer. Caregivers and others who are impacted by the diagnosis are certainly encouraged to fully engage with LBBC but will not, during this period, be provided dedicated or customized resources.

Goals are broad, qualitative statements of what the organization hopes to achieve – they define the destination.

Strategies are the general approaches or methods for attaining organizational goals.

Objectives describe the measures of change needed to bring about the achievement of the goals. (An objective establishes a target for a metric); note that, wherever possible, objectives should describe outcomes, rather than outputs.

Metrics are what are counted and compared to provide evidence of the degree to which objectives are attained over a specified time.

Targets set the “how much” and “by when” components.

Tactics are actionable and concrete descriptions of how strategies will be executed to achieve the objectives.

Goals and Strategies for 2019-2022

1) Grow our reach to – and engagement with – people diagnosed with breast cancer
   a) Grow our reach to people diagnosed with breast cancer at the three journey points. Our baseline for reach was 610,000 in 2018. Reach will rise to 670,000 in 2020; 740,000 in 2021 and 820,000 in 2022.
   b) Increase our engagement with people diagnosed with breast cancer at the three journey points.
   c) Grow our reach to HCPs and increase their patient referrals to LBBC. (HCPs defined as Oncology Social Workers, Oncology Nurses, Nurse Navigators, Physician Assistants, Nurse Practitioners)
   d) Drive brand awareness through all departments, programs, and activities.
e) Engage more deeply with low-income (<250% of federal poverty guideline) -- and low-income, newly diagnosed – people with breast cancer we reach in our programs.

2) Elevate – and be recognized as elevating -- the lived experience of people diagnosed with breast cancer  
   a) Contribute our expertise to discussions & decisions affecting people diagnosed with breast cancer  
   b) Grow the number & diversity of qualified ambassadors of LBBC expertise  
   c) Grow demand for our expertise by media, policy makers, influencers

3) Make the strategic investments in infrastructure to enable achievement of Goals One & Two  
   a) Align resources to drive successful operational plan  
   b) Invest in technology: including CRM and website redesign  
   c) Invest in promoting a diverse work environment that reflects the client base LBBC serves

4) Build to sustain an annual budget of $6M  
   a) Leverage comprehensive fund development plan to increase the predictability of annual income and direct internal resources to focus on most cost-effective sources of funds  
   b) Differentiate and prioritize funding streams to maximize revenue (to be further defined by fundraising plan)
## Appendix A

### Goals: December 2018

<table>
<thead>
<tr>
<th>Strategic Goals</th>
<th>Clarifying Strategies</th>
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<tbody>
<tr>
<td>1. Grow our reach to – and meaningful engagement with – people impacted by breast cancer</td>
<td>Engage with patients and their circles at three journey points</td>
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<td>Deepen our reach to HCPS and increase their patient referrals to LBBC</td>
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<td>Continue to drive brand awareness</td>
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<td>Expand our digital engagement</td>
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<td>Maintain and demonstrate our commitment to the underserved</td>
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<td>2. Be – and be recognized as -- the voice of the patient regarding the full-range of psycho-social and medical dimensions of their breast cancer experiences</td>
<td>Contribute our expertise to discussions &amp; decisions affecting patients</td>
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<td>Grow the depth &amp; breadth of the content of our expertise</td>
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<td>Grow the number &amp; diversity of LBBC experts who share our content</td>
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<td>Grow demand for our expertise by media, policy makers, influencers</td>
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<tr>
<td>3. Make the Strategic Investments in Infrastructure to enable achievement of Goals One &amp; Two</td>
<td>Invest in strategic marketing/brand platform, content strategy, decision-making</td>
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<td>Invest in staffing model, leadership development, governance documentation, diversity plan</td>
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<td>Invest in technology: plan (including CRM) implemented by EOY 2022</td>
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## Appendix B
### Goals, Strategies and Objectives: August 2019

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<tr>
<th>Goals</th>
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<tbody>
<tr>
<td>a. Grow our reach to people diagnosed with breast cancer at the three journey points. Our baseline for reach was 610,000 in 2018. Reach will rise to 670,000 in 2020; 740,000 in 2021 and 820,000 in 2022.</td>
<td>Identified people already in our database at each journey point to establish baseline for growth by EOY 2020. Grown our reach to people at each journey point by 25% for JP1 (Newly diagnosed early stage; 10% for JP2 (newly diagnosed metastatic), &amp; 10% JP3 (post active treatment) by EOY 2020; in 2021 10% for JP1; 25% JP2; 10% JP3.</td>
<td>Developed tools and/or processes to identify and measure number of people at each journey point who “go to the content we develop” by EOY2020. By close of 2019, track activities by journey point on volunteerism, guide downloads, program registration and donations. Track key KPIs for journey point web traffic. Tested the effectiveness of outreach strategy to engage individuals at journey points, resulting in 20% of those who have joined the mailing list engaging with three LBBC programs in 2020. (Target: 25% in 2021, 30% in 2022) Completed content roadmap for individuals at each journey point, and metrics developed to measure interaction at each point by EOY 2020.</td>
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<td>b. Increase our engagement with people diagnosed with breast cancer at the three journey points</td>
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<tr>
<td>c. Grow our reach to HCPs and increase their patient referrals to LBBC. (HCPs defined as Oncology Social Workers, Oncology Nurses, Nurse Navigators, Physician Assistants, Nurse Practitioners)</td>
<td>Utilizing data gathered in 2019, developed and implemented HCP outreach strategy that leverages connections with HCPs, professional organizations, and partners in 2020; using the success of this in 2020, in years 2021 and 2022 refined goals and outreach metrics. Increased the number of HCPs in our DB who refer their patients to LBBC in by 25% by EOY 2020; and 10% in 2021 and 2022. Grown our HCP Newsletter signups by 25% per year. Developed mechanism for identifying referrals; set baseline measurement (2020); and in 2021 and 2022 increased referrals by 10% each year.</td>
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<td>d. Drive brand awareness through all departments, programs, and activities</td>
<td>Increased new site sessions by 15% in each year. Increased volume of branded and campaign social mentions by 10% in each year. Increased total number of program participation in programs by 20% in each year. Grown email list among growth segments by 30% in 2020; (Reassess growth rates for future years by EOY 2020) Increased number of new donors via Facebook or Instagram by 5% each year.</td>
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<td><em>Stated as “our objective is to have ... by ...”</em></td>
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<td>e. Engage more deeply with low-income (&lt;250% of federal poverty guideline) -- and low-income, newly diagnosed -- people with breast cancer we reach in our programs.</td>
<td>Maintain organizational commitment to sustaining the LBBC Fund at $155,000 annually to disperse one-time grants to people living in our local community ($90,000) and select nation communities ($65,000) who are facing financial challenges due to their breast cancer diagnosis.</td>
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<tr>
<td></td>
<td>a. Contribute our expertise to discussions &amp; decisions affecting people diagnosed with breast cancer</td>
<td>Developed a two-year plan to create an “LBBC speakers bureau” to represent LBBC by EOY 2021</td>
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<td>b. Grow the number &amp; diversity of qualified ambassadors of LBBC expertise</td>
<td>By end of 2021, deploy 10 trained qualified LBBC Speakers Bureau ambassadors who will speak publicly about and on behalf of LBBC</td>
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<td>c. Grow demand for our expertise by media, policy makers, influencers</td>
<td>Identified targeted high visibility publications, assessed them and developed a plan for outreach to them. Established baseline number of times they mention LBBC in (2020); create the plan in 2021 and have increased by 25% the number of times they mention LBBC in 2022.</td>
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<tr>
<td>2: Elevate -- and be recognized as elevating -- the lived experience of people diagnosed with breast cancer</td>
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<td>Identified targeted policy makers (individuals, institutions, consortia) and increased by 15% in 2022 the number of times they request LBBC speaker to participate or provide input/advice.</td>
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<tr>
<td>3: Make the Strategic Investments in Infrastructure to</td>
<td>a. Align resources to drive successful operational plan</td>
<td>Defined and implemented staffing model to align internal resources with operational plan which includes fundraising plan (2020)</td>
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**Goals, Strategies and Objectives: August 2019**

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<tr>
<td><strong>Enable achievement of Goals One &amp; Two</strong></td>
<td>Developed (2020) and implemented (2021) career pathing and a commitment to professional development (by 2022)</td>
<td>Stated as “our objective is to have ... by ...”</td>
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<tr>
<td>b. Invest in technology: including CRM and website redesign</td>
<td>Designed CRM in 2020, piloted it in 2021, fully deployed and integrated it in 2022</td>
<td>Fully implemented website platform redesign in 2021</td>
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<tr>
<td>c. Invest in promoting a diverse work environment that reflects the client base LBBC serves</td>
<td>By end of 2020, designed (or adapted) and implemented tools, processes, and trainings that leverage industry leading practices to improve recruitment and retention of diverse staff, Board and volunteer candidates</td>
<td>By 2022, developed a long-term plan to achieve a diverse staff, board and volunteer corps.</td>
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#### 4: Build to sustain an annual budget of $6M

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<tr>
<td>a. Leverage comprehensive fund development plan to increase the predictability of annual income and direct internal resources to focus on most cost-effective sources of funds</td>
<td>Completed Development assessment (2019)</td>
<td>Stated as “our objective is to have ... by ...”</td>
</tr>
<tr>
<td>b. Differentiate and prioritize funding streams to maximize revenue (to be further defined by fundraising plan)</td>
<td>Developed (2019), implemented (2020), and revised/updated impact of (2021 and 2022) fundraising plan</td>
<td>Build a reliable, sustainable $6 million organization with increases in individuals and non-pharmaceutical corporations. $5.7M in 2020, $5.85M in 2021, $6M in 2022.</td>
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<td>Implemented new individual philanthropy programs such as a major donor program, a monthly donor-giving club, planned giving society, etc. (2020)</td>
<td>Set percentage targets for 2020 revenue funding streams (individual donors, major donors, corporate, grants, gala, board giving, etc.)</td>
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<td>Created corporate council (2020)</td>
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Appendix C
Links to key references

I. Strategic Focus Project (supported by Throughline)

II. Platform and brand definition (supported by Karma)

III. Organizational Design (supported by Praxis)

*Links will be added in order for staff to reference.*