Assumptions:

- We will continue to organize our work as Education/Advocacy/Programs/Research.
- We will pivot and reframe existing programs to meet the three-year objectives. We will continue to evaluate our mission portfolio to assess impact, reach and revenue potential.
- Our mission staff in markets are instrumental for program development and execution that may be scaled to other markets.
- We must define and develop measurement infrastructure to measure inform and reach goals to deliver public health impact.
- We need to ramp up subject matter expertise in newer focus areas.

Goal 1: Reduce adverse pregnancy outcomes due to maternal cardiovascular disease by 25%

REDUCE MATERNAL MORTALITY BY 20% IN 5 YEARS

REDUCE PRETERM BIRTH BY 10% IN 5 YEARS

Objective A: Activate 3 partnerships for quality improvement efforts, with emphasis on elevating the voices of moms and families

Strategic Action I: Activate partnerships to disseminate improvements in implementing best practices for hypertension and cardiovascular disease (e.g., national low dose aspirin for preeclampsia initiative, cardiac conditions in obstetrical care bundle).

Strategic Action II: Activate partnerships to address system and access issues for maternal cardiovascular disease (e.g., Maternal HealthCARE, HCA, Collective Impact, IMPLICIT interconception care toolkit).

Strategic Action III: Activate partnerships with patient-focused organizations to elevate the voices of moms and families (e.g., Preeclampsia Foundation, American Heart Association, MoMMa’s Voices).

Objective B: Increase the knowledge of 50k health care professionals to improve identification and timely treatment of hypertensive disorders

Strategic Action I: Update current educational content and develop new content and tools for healthcare professionals on hypertensive disorders of pregnancy and maternal cardiovascular disease, incorporating the equity lens and identifying key areas of health disparities.

Strategic Action II: Partner with Marketing and Communications and Markets to disseminate educational offerings for maternal cardiovascular disease to existing and new channels, including health equity-related tactics to reach health professionals who serve underserved areas and populations (e.g., Emergency Medicine providers, Primary Care providers, Pediatricians, Pharmacists).
**Strategic Action III**: Explore new sources of data for maternal cardiovascular disease and integrate data into March of Dimes offerings to share with health professionals and stakeholders (e.g., Epic COSMOS).

**Objective C**: Inform and build awareness among 6M women about cardiac health before, during and after pregnancy

**Strategic Action I**: Update and enhance existing consumer education content and create a suite of consumer education information on maternal cardiovascular health with an equity lens that can be incorporated into March of Dimes offerings (e.g., SPC, BAM, Mobile Health, It Starts with Mom).

**Strategic Action II**: Partner with Marketing and Communications, Markets, and other departments to disseminate consumer education content through additional channels (e.g., website, mission-affected app, social media, events).

**Objective D**: Advocate for federal policies and legislation in 12 states that enhance access to care and extend postpartum coverage to mitigate the causes of maternal mortality and morbidity

**Strategic Action I**: Advocate for permanent Medicaid expansion/extension and state paid leave policies using grassroots advocates, partnerships, and advocacy networks to raise awareness and support with policy makers.

**Objective E**: Create 2 new annual collaborative research awards focused on characterizing and mitigating disparities in hypertensive disorders

**Strategic Action I**: Fund research on maternal cardiovascular disease and adverse pregnancy outcomes.

**Strategic Action II**: Make information about March of Dimes’ supported research more accessible to increase internal and external understanding, access and awareness.

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**Goal 2**: Reduce adverse outcomes driven by non-medically indicated inductions and cesareans by 25%

**REDUCE MATERNAL MORTALITY BY 20% IN 5 YEARS**

**REDUCE PRETERM BIRTH BY 10% IN 5 YEARS**

**Objective A**: Create a minimum of 3 national partnerships to implement evidence-based practices that optimize timing and mode of delivery to reduce unnecessary inductions and cesareans and reduce disparity gaps

**Strategic Action I**: Activate partnerships to disseminate improvements in implementing best practices to reduce non-medically indicated induction and cesarean births, including leveraging current partnerships and tools, and expanding partnerships with clinical professional organizations, perinatal quality and regulatory organizations (e.g., leverage partnerships from the 39 Week Campaign).

**Strategic Action II**: Collaborate with partners to inform the development of new evidence-based resources and tools to support best practice and health equity (e.g., clinical decision tools that connect cesarean delivery reduction with morbidity reduction, determine risk stratification for when a cesarean delivery is appropriate, identify optimal threshold of maternal and neonatal morbidity, measurement of birth equity accountability).
Objective B: Increase the knowledge of 50k health care professionals to reduce non-medically indicated inductions and cesarean birth

Strategic Action I: Update and develop educational content and tools for healthcare professionals on non-medically indicated induction and cesarean births with health equity integration and alignment (e.g., revise content from the 39 Week Campaign).

Strategic Action II: Partner with Marketing and Communications and Markets to disseminate educational offerings for non-medically indicated induction and cesarean births to existing and new channels, including health equity-related tactics to reach health professionals who serve underserved areas and populations.

Objective C: Increase the knowledge and awareness of 3M birthing parents on the risks and alternatives to non-medically indicated inductions and cesarean births

Strategic Action I: Update and enhance existing consumer education content and create a suite of consumer education information on non-medically indicated induction and cesarean births with an equity lens that can be incorporated into March of Dimes offerings (e.g., revise and update 39 Week Campaign educational materials).

Strategic Action II: Partner with Marketing and Communications, Markets, and other departments to disseminate consumer education content through additional channels (e.g., website, mission-affected app, social media, events).

Goal 3: Improve support for chronic maternal stress and maternal mental health conditions for 1M people

REDUCE MATERNAL MORTALITY BY 20% IN 5 YEARS

REDUCE PRETERM BIRTH BY 10% IN 5 YEARS

Objective A: Increase knowledge of 50k health care professionals on awareness, screening and interventions for maternal mental health

Strategic Action I: Update and develop educational content and tools for healthcare professionals on maternal mental health with health equity integration and alignment.

Strategic Action II: Partner with Marketing and Communications and Markets to disseminate educational offerings for maternal mental health to existing and new channels, including health equity-related tactics to reach health professionals who serve underserved areas and populations.

Objective B: Provide access to self-screening tools for mental health care to 1M people through select March of Dimes offerings

Strategic Action I: Identify and/or improve available screening tools to disseminate to key audiences that also address barriers to access (e.g., IMPLICIT interconception care toolkit, mission-affected app).

Strategic Action II: Update and enhance existing content and create a suite of tools and resources for maternal mental health that can be incorporated into March of Dimes offerings (e.g., Postpartum program, SPC, BAM, Mobile Health, It Starts with Mom).

Objective C: Advocate for federal policies and state policies in 12 states that cover screening and treatment for mental health conditions
**Strategic Action I:** Advocate for policies that improve access to maternal mental health screening and treatment (e.g., increased appropriations for mental health Hotline), parental leave efforts in states and at the federal level, and expansion of equitable access to midwifery care and doula support, using grassroots advocates, partnerships and advocacy networks to raise awareness and support with policy makers.

**Objective D:** Develop and fund a targeted research theme that requires awardees to directly characterize the mechanisms through which chronic maternal stress affects perinatal outcomes

- **Strategic Action I:** Fund research on health equity, social determinants of health, mental health and adverse pregnancy outcomes.
- **Strategic Action II:** Develop and launch the Health Equity Center, partnering with institutions that represent target populations with disparate access to quality maternity and mental health care.
- **Strategic Action III:** Make information about March of Dimes supported research more accessible to increase internal and external understanding, access and awareness.

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**Goal 4: Increase support after adverse perinatal outcomes to prevent subsequent adverse outcomes for 2M parents and families**

**Objective A:** Increase the knowledge of 500k health care professionals who support families with adverse outcomes with trauma-informed care and risk identification so that they can identify, address and support families effectively

- **Strategic Action I:** Update current educational content and develop new content and tools for healthcare professionals on adverse outcomes and reducing stigma, with a trauma informed lens, incorporating the equity lens and identifying key areas of health disparities.
- **Strategic Action II:** Partner with Marketing and Communications and Markets to disseminate educational offerings for adverse outcome support and reducing stigma with a trauma informed lens to existing and new channels, including health equity related tactics to reach health professionals who serve underserved areas and populations.

**Objective B:** Increase access to support and education for 2M parents and families, integrated with community supports, experiencing NICU stays, loss and trauma

- **Strategic Action I:** Update and enhance existing consumer education content and develop standards on trauma-informed language and strengths-based perspective with an equity lens that can be incorporated into March of Dimes offerings.
- **Strategic Action II:** Partner with Marketing and Communications (and other departments) to disseminate consumer education content, services, resources and support through leveraging partnerships and additional channels, which ensure topics of loss are integrated (e.g., website, mission-affected app, social media, events).
- **Strategic Action III:** Develop services, resources and supports for surviving spouses/partners/children who may have been impacted by a maternal death or severe maternal health complication.

**Objective C:** Advocate for comprehensive federal paid leave and/or paid leave policies in 12 states for all parents and pregnancy accommodations, including those experiencing NICU, loss and trauma

- **Strategic Action I:** Advocate for comprehensive federal paid leave/paid leave policy expansion/extension and state paid leave policies using grassroots advocates, partnerships,
and advocacy networks to raise awareness and support with policy makers (e.g., Pregnant Workers Fairness Act, March for Change).

**Objective D:** Partner with 2 organizations to design and implement adaptable models of family-centered care in the NICU setting in selected low-resource countries

**Strategic Action I:** Activate partnerships for designing and developing family-centered care models in the NICU setting that meets the needs of families in low-resource countries.

**Strategic Action II:** Develop partnerships with funders and organizations with a global health portfolio.

**Goal 5: Accelerate the prevention of spontaneous preterm birth, birth defects and other adverse newborn outcomes by increasing research investment to 10%**

**REDUCE PRETERM BIRTH BY 10% IN 5 YEARS**

**Objective A:** Convene 10 global partners to accelerate surveillance, prevention of and care for newborns with birth defects and disabilities in low- and middle-income countries

**Strategic Action I:** Host the 2023 International Conference on Birth Defects & Disabilities in the Developing World in Santiago, Chile in partnership with the School of Medicine, Pontificia Universidad Catolica de Chile, the World Health Organization, the U.S. Centers for Disease Control and Prevention, the London School of Hygiene and Tropical Medicine and others.

**Strategic Action II:** Host the 2025 International Conference on Birth Defects & Disabilities in the Developing World in a sub-Saharan African country in partnership with the World Health Organization, the U.S. Centers for Disease Control and Prevention, the London School of Hygiene and Tropical Medicine and others.

**Strategic Action III:** Collaborate with partners to develop a global report featuring updated data on birth defects and disabilities.

**Strategic Action IV:** Collaborate with partners to develop the 2nd edition of Born Too Soon and ensure the inclusion of content on preventing and caring for newborns with birth defects and disabilities.

**Objective B:** Provide access to birth defects prevention education through culturally relevant content to 600k people through select March of Dimes offerings

**Strategic Action I:** Integrate updated birth defects and disabilities educational content into existing March of Dimes offerings ensuring that content is available in Spanish and other languages relevant to target audiences.

**Strategic Activity II:** Identify partners in the field of maternal and newborn health and birth defects and disabilities to expand the reach of March of Dimes educational offerings.

**Strategic Activity III:** Develop new educational content and revise existing educational content for birth defects and disabilities integrating equity and disparities-reduction language.

**Strategic Activity IV:** Work with key partners to expand the reach of multi-media campaigns featuring the prevention, care and management of birth defects and disabilities (e.g., World Prematurity Day and World Birth Defects Day).

**Objective C:** Advocate for increased newborn screening coverage for priority conditions in 9 states
Strategic Activity I: Update newborn screening policy issue briefs and supporting documentation for policy makers, advocates and March of Dimes Market staff.

Strategic Activity II: Use annual state newborn screening data and the Recommended Uniform Screening Panel (RUSP) conditions to develop advocacy campaigns including community advocacy days and targeted communications to state legislators.

Strategic Activity III: Build out a cohort of grassroots advocacy leaders to advocate for newborn screening in targeted states.

Objective D: Build and support 2 new large-scale research collaborations or centers, domestic or international, that characterize the etiology of spontaneous preterm birth and birth defects and provide roadmaps toward prevention of the same

Strategic Activity I: In partnership with March of Dimes Marketing and Communications team, develop and implement an outreach plan to identify research partners and efforts in the areas of spontaneous preterm birth, birth defects and other adverse newborn outcomes.

Strategic Activity II: In partnership with March of Dimes Markets, Marketing and Communications, Development and Revenue teams, broaden donor outreach to secure funding for expanded research in the areas of spontaneous preterm birth, birth defects and other adverse newborn outcomes.

Strategic Activity III: Award new research agreements to enhance learning in the areas of spontaneous preterm birth, birth defects and other adverse newborn outcomes.

Assumptions:

- The role of movement is to mobilize people who connect to our mission and to engage core audiences who are affected by and concerned with our mission in ways that deliver value to them
- We need to increase our investment in brand awareness from $4M to $10M over three years to reach targeted audiences and enable overall growth of March of Dimes. Lack of brand awareness is hindering our ability to grow overall.
- We must target younger audience populations who don't know us today and improve awareness and familiarity by an average of 50%.
- We must deliver more diverse content, specifically the inclusion of multi-lingual content, to reach the audiences who are at greatest risk and expand our global presence.
- We must improve our ability to provide and grow community engagement opportunities for our audiences to better connect with each other and March of Dimes.
- We must position March of Dimes as a trusted partner to healthcare professionals and researchers to ensure our programs are able to grow.

Goal 1: Reach the 6 million women who get pregnant every year through consumer education and community activation to ensure that those who are at greatest risk of adverse outcomes (cardiovascular, mental health, caesarean births, and preterm births) or in need of support are informed and have access to the resources they need
Objective A: Deliver multi-lingual consumer education that aligns to mission impact goals to help increase MIH knowledge among women of child-bearing age – primarily women of color (black, Hispanic, indigenous) – and their partners/spouses/joint-caregivers from issue awareness of 3 out of 10 to 6 out of 10

Strategic Action I: Continue to evolve and grow the It Starts with Mom consumer education campaign to reach 1M women on an annual basis through unique partnerships, new in-person and online activations and annual updates to content that is aligned to our mission impact areas.

Strategic Action II: Execute monthly Healthy Moms Strong Babies webinars via owned social media channels to drive a minimum of reach of 30k (avg.) per episode by individuals – primarily among women of color – in greatest need of our resources and support.

Strategic Action III: Reach 500k Spanish-speaking women annually by expanding Spanish language content into our website, app and offline resources, enable multi-language translation on our website by end of 2024.

Objective B: Create a new streamlined community-based experience via digital channels (app, website and FB group) to support a minimum of 30k individuals who have an affinity to our mission because of an adverse MIH outcome (personally or a loved one) or a healthy pregnancy

Strategic Action I: Ensure high quality data capture and analysis that strengthens connection between March of Dimes and affinity groups through meaningful and relevant communication.

Strategic Action II: Launch new membership model program and reimagine the role of our existing community-based platforms (Share Your Story, Facebook group, Unspoken Stories) to better meet the needs of our supporters and those who we support.

Goal 2: Establish a trust score of 85% among the healthcare and research communities through a strategic communications and thought-leadership program

Objective A: Position March of Dimes as an expert, leading voice on maternal and child health issues among health professionals, hospital partners, researchers and other mission-aligned organizations by reaching a trust score of 85%

Strategic Action I: Execute a targeted, multi-channel communications plan to reach healthcare professionals and researchers by generating 2M impressions annually through earned, paid and owned channels and a new March of Dimes expert-speakers bureau.

Strategic Action II: Execute a thought-leadership program by securing 6 sponsorships, speaking opportunities and published bylines or manuscripts in highly regarded professional venues and publications on an annual basis.

Goal 3: Increase brand equity among the general population from a score of 42 to 50 to improve brand relevance and garner monetary support now and for generations to come through a $10M annual investment (currently $4M) in multi-channel advertising and media relations to reach 3B impressions

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1 Baseline established in early 2023
Objective A: Increase brand awareness and familiarity among younger audiences by 50%, specifically Millennials and Gen Z to a familiarity score of 70 and 40, respectively, to heighten unaided awareness of the organization to future core audiences as mission affected, volunteers, advocates and donors

Strategic Action I: Execute targeted, multi-channel strategies through paid advertising campaigns and earned media outreach, including 1 new partnership and 1 new Celebrity Advocate Council member per year, to introduce March of Dimes’ mission to more than 600M Millennial and Gen Z individuals on an annual basis.

Objective B: Maintain a healthy 80-point brand familiarity level and increase current brand momentum, consideration and quality scores to 25, 70 and 50 respectively across Gen X and Baby Boomer audience segments to leverage their demonstrated propensity for support and donations today

Strategic Action I: Execute targeted, multi-channel strategies through both paid advertising (CTV, digital, etc.), and owned channels (website, social media, email) to generate 400M impressions annually in an effort to retain existing Baby Boomers and Gen X individuals.

Goal 4: Acquire, engage and deepen commitment with 500k supporters (volunteers, advocates and donors) to significantly improve maternal and infant health outcomes

Objective A: Recruit and engage 10% more volunteers (26.5k total) and advocates (40k total) each year in order to build a movement to achieve our mission outcomes

Strategic Action I: All volunteers and advocates are flagged in ROI and other systems to ensure appropriate/accurate tracking.

Strategic Action II: Execute Blanket Change campaign and March for Change events around the country to bring in 3k new advocates annually.

Strategic Action III: Convert those that join our campaigns to take action through new national volunteer engagement opportunities, days of action and new mission delivery volunteer roles.

Objective B: Double the number of supporters (volunteers, advocates and donors) who take more than one action (a second action of volunteering, advocating or donating) in support of our mission objectives to drive deeper commitment and engagement

Strategic Action I: Continue to evolve constituent data collection and establish/grow baseline for overlap between volunteers/donors/advocates.

Strategic Action II: Increase the number of new National Service Partner advocates 2k each year and integrate March of Dimes policy priorities into NSP sponsored lobbying activities; increase number of NSPs on boards by 20-30 and increase NSP individual volunteer actions by 10%.

Objective C: Deepen engagement with existing partners and expand partnerships aligned with mission objectives by integrated relationship management and formalizing new, unique partnerships to acquire new supporters (volunteers, advocates or donors) who engage in meaningful activations in and around our mission priorities

Strategic Action I: Create a cross functional strategic partnerships working group to create master catalog of partnerships to standardize partnership purpose, criteria, onboarding process, and value add; then review/revise processes and materials quarterly.

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2 Baseline established in early 2023 with implementation of data warehouse
**Strategic Action II:** Raise $2.5-$3.5M through National Service Partners activations, and ensure all National Service Partners are engaged in 3 activations per year, including signature projects.

**Strategic Action III:** Sign one new National Service Partner and one new media/brand partner per year.

**Objective D:** Increase Market Board and Volunteer Leader Effectiveness by showing that at least 75% of boards are on-track with revenue targets, mission deliverables and volunteer engagement; ensure that each market has a robust volunteer leader pipeline of 5-15 qualified prospects in ROI at all times.

**Strategic Action I:** Implement and reinforce the national action plan, which will help us recruit and develop more diverse, committed, high quality volunteer leaders. Identify 30% of markets each year and work with them to recruit new volunteer leaders resulting in new revenue on boards and committees.

**Strategic Action II:** Conduct a volunteer leader engagement and satisfaction survey (net promoter score) yearly reaching 50% participation and 70% satisfaction by 2025 and disseminate results to markets to include in their performance tracking, complete Standards of Excellence assessments annually and track year over year progress.

**Strategic Action III:** Grow racial/ethnic diversity across all Market Boards (in relation to market demographics) 10-20% and educate 50% of boards on DEI principles. Annually convene volunteer leaders share best practices through a virtual peer group series (200), the annual volunteer summit (100-150), and private LinkedIn group (1500).

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**Assumptions:**

- We must invest in skilled and more productive development staff. We also must create efficiencies in enablers like centralized logistics and procurement.
- Plan also assumes productivity increases year over year due to process improvement, sales competence and training.
- Significant growth through stewardship of major, planned gifts and transformation asks of individual and corporate donors.
  - In order to grow major and transformational gifts, we need a strong bench of engaged, high-level leadership volunteers across all markets (pipeline).
- Assumes increase to $750k per year the Learning Training and development budget in HR.
- Leverage March for Babies to act as an entry point for donors and volunteers seeking information on March of Dimes, mission education, aligned communities, engagement opportunities, and to increase March of Dimes brand visibility.
- We will redirect 15-20% of direct mail expense over 3 years to “test to invest” more in brand building and digital efforts to reach new audiences that will yield a decline in revenue in this area, but increase brand relevance to drive revenue and growth in other areas (major gifts, corporate, planned giving and membership model).
  - This will yield a revenue decline in this area and is predicted to drive an overall reduction in donors, but will increase brand relevance and donor value to drive revenue and growth in others (ex. major & planned gifts, corporate, membership).
- All actions will be tracked and managed through ROI.
Goal 1: Diversify and grow net revenue to $150M ($160M gross) by focusing on mission delivery and impact

Objective A: Grow mission investment revenue (MIO) to $14.5M (markets) and $11M (national Corporate Giving) by building out new mission focused events, programs/initiatives and opportunities aimed at deepening engagement, securing corporate, foundation relationships and high net worth individuals supporting the mission goals focused on cardiac, maternal mental health, non-medically indicated induction and caesarean births, support for adverse perinatal outcomes and prevention of PTB, birth defects and research

Strategic Action I: Develop and build more sophisticated higher value seven figure Mission Investment Opportunities for Fortune 500 companies and high net worth individuals and engage 3 high net worth individuals and 6 Fortune 500 companies around these in 2023. Close one seven figure Mission Investment Opportunity with a high net worth individual and Fortune 500 company in 2024 and close two seven figure Mission Investment Opportunities in 2025.

Strategic Action II: Develop corporate and private foundation strategy and identify 10 grant opportunities to apply for in 2023. Close 2 gifts at $100k+ in 2024 and 2 at $250k in 2025.

Strategic Action III: Develop research value proposition for corporate partners and pitch 3 research opportunities to Fortune 500 companies in 2023, close one corporate partnership supporting research portfolio in 2024 and two in 2025.

Objective B: Grow, innovate and scale campaigns (March for Babies – $39.5M and Special Events – $29M) to $68.5M (representing 45% of total revenue and an average growth rate of 10% year over year), by focusing on corporate sponsorship, volunteer stewardship, retention, campaign standards of excellence and new and expanded events infused with mission delivery

Strategic Action I: Continue to expand reach using Special Events and affinity segmentation with the objective of bringing in new donors, deepening relationships, driving revenue, reaching constituents with mission content. (Goal to retain x% in March for Babies and x% Special Events, drive increase average gift size year over year, and reach x individuals with mission content).

Strategic Action II: Strategically analyze and develop penetration plans for new events both in person and virtually. Through new business development create 1-2 new platforms that drive $1.5M in new revenue by 2025. Implement new Signature Chefs in 6 markets by 2025; expand new Champion of Year event into 10 markets with $1M in revenue by 2025.

Strategic Action III: Secure 5 new national sponsors for March for Babies and 5 for Special Events by 2025 (1; 2; 2) driving X$ by 2025.

Strategic Action IV: Continue to utilize MFB as a stewardship platform to identify, pipeline and secure high-level C-suite volunteer leaders and grow donors and volunteers, increase brand visibility, retain 35% of team captains, increase circle of champions 10% year over year and increase team fundraising goals to $2.5k+ year over year.

Objective C: Continue to steward, develop and grow high value donors and high value channels. Grow Major Gifts ($13M), Planned Giving ($10.5M) and other Corporate Giving ($2.5M) revenue to $26M by 2025 (56% increase) by focusing on pipeline development, research, Roosevelt Society year over year growth, retention and increased average gift size, utilization of more sophisticated technology to increase productivity and manage through Book of Business for stewardship

Strategic Action I: Build pipeline to upgrade donors into Major Gift and Planned Gift donors through Book of Business by building portfolio of 20 high value net worth individuals by 2023 and moving 30 donors into high touch plans in 2024 and 60 in 2025.
Strategic Action II: Continue to expand and steward the Innovation Fund as a key channel for March of Dimes securing $3M and 5 new prospects in 2023, 7 new prospects and $4M in 2024 and 10 new prospects and $5.5M raised in 2025. Create Innovation Fund impact reports and impact reports for all mission products.

Strategic Action III: Develop and implement corporate strategy to ensure 80% retention rate of national corporate partners, leverage technology to execute a corporate account-based lead gen strategy engaging 1000 companies with capabilities for 6-7 figure partnership in 2023, 1500 in 2024 and 2000 in 2025, and secure 3 new point of sale campaigns valued at $100k+ each year until 2025. Explore key corporations that align with our new mission goals such as heart health and maternal mental health.

Strategic Action IV: Expand planned gift focus in markets with digital lead gen and targeted outreach to secure 80 planned expectancies in 2023, 100 in 2024 and 120 in 2025.

Strategic Action V: Execute new Roosevelt Society stewardship plan to retain members and build a robust pipeline to secure 10 new in 2023, 15 in 2024 and 20 in 2025 including a $1M+ member.

Objective D: Reach $30M in direct marketing revenue through reduction of investment in direct mail by 15-20% and increased investment of 30% to acquire new donors via paid and owned digital programs (e.g., membership model, Metaverse, livestream)

Strategic Action I: Optimize the investment mix in direct mail program to maximize retention program as a pipeline for planned and major gift donors, and modestly invest in acquisition to avoid large scale decline of file (reduction in investment will shrink file size by 30% and decrease revenue in direct mail by 20%).

Strategic Action II: Heavily invest (30% growth) in the testing and implementation of new, highly diversified direct marketing strategies, specifically membership model and emerging digital channels.

Strategic Action III: Grow annual days of giving/initiatives by 100% through multi-channel and market/geo-agnostic growth strategies (including Annual Giving Day, WPD, Giving Tuesday, etc.); refine fundraising strategies to optimize for primary fundraising March of Dimes events like March for Babies.

Strategic Action IV: Increase digital channel revenue by 50% through innovation and scaling new donor acquisition and retention models.

Objective E: Utilize relationship management capabilities, assisted by digital and consumer segmentation enablers to help every fundraiser build a 4:1 pipeline by 2025, retain of 40% of donors and constantly maintain a portfolio of 20 high value net worth individuals by 2023

Strategic Action I: Utilize activity plans in ROI to provide high quality stewardship of donors including cultivation, asks and stewardship to retain and upgrade donors year over year.

Strategic Action II: Establish baseline in 2023 of average gift size and retention across all channels.

Strategic Action III: Continue to train, manage and mandate our digital transformation to ROI as the activity-based system of record. 85% of all staff activities will be recorded in ROI, expanded in 2023 to include all monetary asks through new Projects and Proposals option in ROI.
Assumptions:

- The industry standard benchmark for nonprofits is 75% employee engagement.
- Industry standard turnover rate is 18%.
- Continue to improve competitive compensation and benefits that are aligned with market expectations to attract the right talent.
- Investment in learning and development is essential to achieve goals.
- The diversity, equity and inclusion focus bring a mix of skills and perspectives and enables overall mission delivery.
- More aligned success measures in the organization will drive transparency and staff engagement.
- Stabilized and enabled core processes and systems, like data warehouse, are in place; the shift for the next three years will focus on integration and transformation of customer experience and relationships.

Goal 1: Enable a highly engaged, people-centered culture, empowered by business processes and made more efficient and reliable by technology, to achieve the 3-year goals

Objective A: Increase employee engagement beyond the industry standard benchmark from 62% to 80%

**Strategic Action I**: Develop staff leadership programs that create pathways for 5% of participants to have received a promotion or be slated to be promoted internally, with succession planning conversations included in the completion of those programs.

**Strategic Action II**: Refine, develop and integrate core values and competencies into all aspects of organization.

**Strategic Action III**: Perform benchmark analysis to ensure competitive and equitable compensation, building to the 50th percentile (P50) for compensation.

**Strategic Action IV**: Reduce organization wide turnover from 18% down to 15% overall. Assign individual turnover goals to each ELC member to improve department by department retention.

**Strategic Action V**: Leverage 3 Employee Resource Groups to facilitate a culture of inclusion and belonging.

Objective B: Develop a workforce that is inclusive and reflective of the communities March of Dimes serves

**Strategic Action I**: Support the recruitment, development and promotion of diverse talent department by department.

**Strategic Action II**: Build a pipeline of diverse candidates through partnerships with 38% of all HBCUs.

**Strategic Action III**: Increase the diversity of talent in leadership roles by identifying top talent to move into leadership positions.
Objective C: Develop, streamline and implement unified business processes and technology that create value and empower 80% of March of Dimes staff that feel equipped to succeed

Strategic Action I: Build capabilities to understand donor acquisition and stewardship across all channels.

Strategic Action II: Implement redefined process to manage grants/secure restricted gifts to accelerate revenue growth.

Strategic Action III: Develop robust solutions for financial reporting, forecasting and analysis.