



Strategic Plan 2020

HFSC Board of Directors

HFSC Mission/Values

New Mission Statement:

“Improving the quality of life and building community for those living with inherited bleeding disorders in Southern California”

Core Values:

- **Passion**
- **Service to community**
- **Teamwork**
- **Integrity**
- **Transparency**
- **Diversity and Inclusion**

Assess the Organization

Strengths

- **Staff**
- **Passion for the mission**
- **Impactful events and programs**
- **Leadership**
- **Funding/financial position**
- **Sense of community/community impact**
- **National reputation**
- **Advocacy**
- **Partnerships, connections and resources to draw on**
- **Inclusion and diversity**

Assessment (Cont.)

Areas for Improvement

- **Planning for the future/strategic planning**
- **Need to diversify funding/fundraising**
- **Marketing/public relations**
- **Board development (size, knowledge, contacts, involvement, committees)**
- **Workload (more staff or less events)**
- **Technology**
- **Metrics for impact and to define success**
- **Expanded outreach (including other bleeding disorders)**
- **Strategic alliances (including non-bleeding rare diseases)**

Notes:

- 1. Emphasize marketing and need for case statement**

Assessment (Cont.)

Threats/Obstacles

- **Uncertain future of industry funding**
- **Uncertain political climate/legislation**
- **Rising treatment costs/access to care**
- **Possible staff burnout/retention**
- **Maintaining awareness within community of need**
- **Developing future leaders**

Opportunities

- **Fundraising (individual and legacy)**
- **New disorders/audiences (other factors, women, etc.)**
- **Enhanced marketing/technology**
- **Rare disease coalition and other strategic alliances**
- **Mentor future leaders for possible board involvement**
- **Develop excellent volunteers**
- **Seek out mental health programs**

Step by Step



**To Meet
Vision**

Strategic Goals 2020-2025

- **A clear, focused and well-defined strategic direction for the future**
- **A strong, knowledgeable, and involved board**
- **A well-funded and sustainable organization**
- **A strong, focused marketing and information outreach plan, including use of technology**
- **A talented, right-sized, and motivated staff**
- **Expanded strategic alliances and partnerships**

Strategies



Strategic Direction

- **Continue development of a viable strategic plan**
 - **Ensure board involvement and support**
 - **Examine critical questions to include:**
 - **Should the needs of ultra rare platelet population be addressed**
 - **Should the name of the organization be changed to reflect wider focus**
- **A community/beneficiaries needs assessment survey might be a good addition to the planning process in the near future**
- **Continue to involve both staff and board leadership in regional and national seminars or conventions to stay current on issues and developments**

Board Development

- **Train, equip and support a board that understands, accepts and meets its responsibilities**
 - Determine needed skills and attributes using a board matrix
 - Conduct a board orientation program on organizational activities and issues. New Governance Committee to develop program
 - Establish a mentor program for new board members
 - Provide appropriate training on board roles and responsibilities
 - Educate board on give/get policy. 100% participation makes a significant difference when applying for outside grant support
 - Create three board committees (Governance, Finance, and Programs). Committees need to meet on their own
 - Create a calendar of board responsibilities for periodic review
 - Conduct continuing education on important topics
 - Board members will receive additional training by Ron on finances
 - Conduct annual board evaluations collective and individual
- **Make board service both fun and rewarding**
 - Reduce unnecessary work
 - Board will meet every two months
 - Make board meetings interesting and issue oriented
- **Inform and engage the board in organizational issues**
 - Ensure board members understand staff member responsibilities/contributions to the Foundation

Financial Sustainability

- **Implement a development plan with schedules and responsibilities**
 - Michele will implement 2020 fundraising plan and reassess future years
 - **Link to strategic planning**
 - Michele will reassess for future years based on strategic plan as well as prior year's activities
 - Marketing materials and case statement Train board on fundraising roles and techniques.
 - Promote board involvement in fundraising
 - **Create a stewardship plan including the use of board members and service beneficiaries to help steward donors**
 - Have the campers create thank you cards
 - **Work with marketing for personal stories**
 - **Collect data on income and other demographics for outside grant submissions**
 - **Down the road develop legacy gift opportunities and a major gift program**
- **Explore other revenue generating opportunities**
 - **Social entrepreneurship**
- **Explore cost reduction opportunities from alliances and partnerships**

Marketing and Outreach

- **Develop need/impact metrics**
 - Create a strong survey to obtain metrics
 - Partner with other appropriate organizations to develop impact metrics
- **Use metrics and impacts to establish a strong case statement for potential donors and foundations**
 - Critical to effective fundraising and advocacy
 - Individual stories are powerful marketing tools
- **Create a new marketing plan to include website, logo, branding, technology, motto/tag line, organizational newsletter**
 - Consider “Serving all people with bleeding disorders” (NorCal example)
 - Hire a marketing
- **Hire a marketing company or individual to redesign website look, feel, Consider hiring additional marketing support**
- **Create a technology plan to maximize dissemination of organizational impact and needs**

Excellent Staff

- **Conduct a workload analysis for the staff.**
 - Develop a staff matrix of needed skills
 - Hire Spanish speaking staff member
 - Consider adding a full time administrator after staff analysis
- **Conduct a staff work study and identify factors which might lead to turnover**
 - Ensure fair compensation
 - Conduct HR benefits analysis
 - Hire ongoing technological support and correct technological insufficiencies
- **Promote staff training and development**
- **Ensure staff activities are understood and appreciated by the board**
 - Board should continue to validate, recognize and praise staff

Alliances and Partnerships

- **Continue to partner with:**
 - Hemophilia Council of CA to ensure strong legislative advocacy voice in Sacramento
 - Also NHF and HFA
- **Partner with a rare disease coalition (if one exists) to build advocacy**
 - Or create one if one does not exist
 - Consider USC School of Social Work or Public Policy to help develop coalition
- **Consider a state-wide gene therapy conference for rare diseases**
- **Begin a dialogue with other rare disease agency leaders to determine if there are mutually supportive ways to enhance effectiveness.**
 - Rick and Brian could help steer the conversation for resources and ideas for ultra rares
- **Research the possibility of grant to evaluate potential alliances and benefits (California Community Foundation)**
 - Consider ways to increase organizational effectiveness
- **Do not create new events for rare bleeding disorders but add some content to existing programs**
 - Advocacy skills apply to all with chronic illness (EmPOWERment Forum)

Implementation Planning

- **Implementation plans should include:**
 - **Specific actions to be taken**
 - **Roles and responsibilities to include oversight and action agencies**
 - **Expected results (objectives)**
 - **Communications**
 - **Develop schedules and sequence of activities**
 - **Monitor activities over time**
- **Create a Steering Committee including Sandy Knight to track plan implementation**
 - **Recruit board champions to oversee various initiatives**



Evaluate and Reassess

- **After implementation is underway**
 - **Publicize progress**
 - **Celebrate accomplishments**
 - **Keep momentum going**
- **Modify plans, if required**
- **Keep strategic thinking in the forefront**

The logo consists of a stylized red graphic on the left, composed of several thick, curved lines that suggest a blood drop or a stylized letter 'H'.

Hemophilia Foundation of Southern California