



Leading the Way:
2020 – 2023 Strategic Plan

Adopted by the Board of Directors: January 14, 2020



Our Mission

Our mission is to enrich the health and well-being of those diagnosed with breast and ovarian cancers – for life - by funding and delivering integrative therapies.

Our Guiding Principles

- **Compassion:** We seek to better understand the experiences of those we serve, which informs our hands-on delivery of love and care in meaningful and considerate ways.
- **Community:** We offer a new and supportive community to help all regain confidence and control.
- **Empowerment:** We are mindful of the emotional and physical journey of those we serve, and we provide education, services, and tools that help them grow and feel stronger.
- **Inclusion:** We are dedicated to building an inclusive community that is bound by a commitment to meet the needs of all who are diagnosed with breast and ovarian cancers.
- **Partnership:** We take great pride in forming lasting, trusted relationships that are meaningful to our mission and to those we serve.
- **Trust:** We put the needs of those we serve first in all that we do, and we carefully steward our resources to ensure the highest standards of service and care.

Our Vision

Every person with breast and ovarian cancers will feel the support of a loving community, and will have access to comprehensive education, services, and tools that enrich their health and well-being.



Our Strategic Goals for 2020 – 2023

Three strategic goals will direct our efforts and investments during 2020 – 2023, beginning with the organization’s fiscal year 2020 – 2021 that starts on July 1, 2020. The goals, key objectives and strategic initiatives are designed to build upon Unite for HER’s record of service and accomplishments, and to position the organization to positively impact more individuals and communities.

- | | |
|-------------------------------------|--|
| I. Outcomes and Impacts | Advance and leverage understanding about our outcomes and impacts. |
| II. Superior Experience | Deliver a superior experience for all people served – and serve more people. |
| III. Organizational Strength | Invest in the strength of the organization. |

Goal I: Outcomes and Impacts

Advance and leverage understanding about our outcomes and impacts.

Key Objectives	Strategic Initiatives	Measures of Success
<p>1. Invest in Unite for HER’s capacity to advance understanding about our outcomes and impacts.</p>	<p>a) Build internal skills for existing staff and dedicate new personnel to research and learning to improve the organization’s capacity to understand and communicate about impacts and the difference we make for individuals and communities served</p> <p>b) Identify with and learn from, if possible, other organizations or institutions with similar missions, goals, and populations served to learn about their experiences and lessons with data analysis, including costs, time, and measurable health benefits for integrative health practices</p> <p>c) Leverage data that is already collected by Unite for HER and other organizations/institutions, and identify data needs to capture the complete story of Unite for HER’s work</p> <p>d) Augment communications with qualitative and quantitative data to illustrate Unite for HER’s impact for those served, to encourage the use of integrative therapies by those going through treatment, and to remove barriers that prevent individuals in treatment from accessing integrative therapies</p> <p>e) Educate the medical and wellness communities, and the general public about the benefits of integrative therapies and holistic health approaches, starting with what they are, and their role in breast and ovarian cancer treatment and overall wellness; leverage Unite for HER data and external research to do so</p>	<ul style="list-style-type: none"> • Evaluation and learning capacities (skills, personnel, systems, partnerships, funding) are in place to capture Unite for HER’s impacts • Data is collected and used to demonstrate Unite for HER’s impact • Communications are strengthened and tailored with data to reach specific audiences • Targeted communications and outreach that increases awareness of and the adoption of integrative therapies and holistic health
<p>2. Compile research related to quality of life metrics.</p>	<p>a) Define quality of life and success metrics, and determine what outcomes Unite for HER has the capacity to measure</p> <p>b) Partner with colleges, universities, consortiums and clinics/institutes, and/or philanthropy to participate in and/or conduct research studies</p>	<ul style="list-style-type: none"> • Quality of life and success metrics are defined, and Unite for HER is able to track and evaluate them • Partnerships result in completed research studies

Key Objectives	Strategic Initiatives	Measures of Success
	<p>to measure the impact of Unite for HER services on an individual's quality of life</p> <p>c) Compare our metrics and evaluation with overarching research on complementary or fieldwide studies</p>	<ul style="list-style-type: none"> • Unite for HER metrics are defined and are connected to overarching or fieldwide studies
<p>3. Compile research related to the Return on Investment (ROI) for services and programs.</p>	<p>a) Quantify the cost-effectiveness of Unite for HER services to share with insurance companies, hospitals, cancer centers, and donors (e.g., decrease in hospital stays, decrease in use of pharmacologic interventions, increase in living quality, and correlation with utilization rates, satisfaction, quality of life metrics) to make the case for investments and possible changes in systems of care</p> <p>b) Track differences across services and demographics to assess outcomes of specific services and interventions for specific populations, and identify the most effective strategies, programs, and services for specific populations</p>	<ul style="list-style-type: none"> • Cost-effectiveness of services is quantified • Differences are tracked across demographics to inform the most effective strategies for specific populations
<p>4. Use research and data as a decision-making tool.</p>	<p>a) Use ongoing evaluation and learning to screen ideas for new programs, services, and partners in a methodical way</p> <p>b) Regularly capture and review lessons learned, and apply them to ongoing and future planning</p>	<ul style="list-style-type: none"> • New ideas are evaluated in a consistent and methodical way to inform decision-making • Ongoing and future planning are informed by rigorous data and evaluation

Goal II: Superior Experience

Deliver a superior experience for all people – and serve more people.

Key Objectives	Strategic Initiatives	Measures of Success
<p>1. Strengthen current services.</p>	<p>a) Strengthen communication upfront and ongoing communication and touchpoints throughout the duration of treatment, such as through a designated liaison for each individual served and digital communications that align with treatment milestones</p>	<ul style="list-style-type: none"> • Those served are clear about what services are available and how to use them

Key Objectives	Strategic Initiatives	Measures of Success
	<ul style="list-style-type: none"> b) Regularly measure the experience and delivery of the programs, including the types and duration of services (e.g., options for longer duration, such as subsidized but not free services, support for the family, meditation, alumni Wellness Days, medical marijuana), and how to ensure that services are flexible; base assessments on the input of those served, service providers, best practices in the field and will inform appropriate updates c) Incorporate mindfulness and life tips in Wellness Days, such as how to navigate work, childcare, and other things that get disrupted by treatment d) Research and develop opportunities, as appropriate, for potential new and enhanced services (e.g., programming for kids and/or partners; referrals to other needed services;) e) Connect individuals to outside resources by deepening partnerships with organizations that can address unmet needs, such as childcare and transportation; consider offering this as a passport service or hosting resource events 	<ul style="list-style-type: none"> • Services are regularly examined and updated to ensure the most positive possible experiences and outcomes • Mindfulness and quality of life-related services are incorporated into Wellness Days • New services are researched and developed, as appropriate (note: this effort should align with the research objectives and initiatives in Goal I) • Connections to other resources are facilitated through partnerships with other service providers and institutions
<p>2. Increase the diversity of individuals served.</p>	<ul style="list-style-type: none"> a) Invest in internal capacities and skills to ensure Unite for HER is an inclusive and responsive organization to all populations (note: overlaps with Goal III.3) b) Partner with diverse organizations to reach and serve diverse populations c) Identify and address barriers to reaching and attracting diverse populations, and address needs in staffing and communications to tailor outreach to diverse populations 	<ul style="list-style-type: none"> • Unite for HER has the capacities and skills to effectively reach and serve diverse populations • Partnerships are established and/or strengthened with diverse organizations help Unite for HER reach and serve diverse populations
<p>3. Increase the number of individuals served.</p>	<ul style="list-style-type: none"> a) Increase the number of individuals served in the current geographic area to achieve market saturation b) Pilot Wellness Days in at least one new geographic location outside the current geographic service area, and evaluate and assess the process and learnings for additional growth opportunities and targets (e.g., saturating Pennsylvania or the Philadelphia tri-state 	<ul style="list-style-type: none"> • Unite for HER is accessible to all individuals in the current geographic area that are diagnosed with breast and/or ovarian cancers • Wellness Days are piloted in at least one new geographic location, and lessons

Key Objectives	Strategic Initiatives	Measures of Success
	<p>area; expanding to one or more state or region; holding a regional or national event/conference), and the most appropriate scale model (i.e., grow Unite for HER, franchise, or consult others to deliver Unite for HER-type services)</p> <p>c) Develop and invest in options to produce immersive virtual wellness experiences that focus on education about integrative therapies, testimonials from program participants, and practical advice</p> <p>d) Conduct regular reviews of programmatic and administrative staff needs to support programmatic expansion, and adjust accordingly</p> <p>e) Set and pursue clearly defined programmatic expansion goals based on the above strategic initiatives and those in Goal I; evaluate progress and adjust strategies accordingly</p>	<p>learned are captured and applied to strategy development for additional replication, if merited</p> <ul style="list-style-type: none"> • The organization has the right staff in place to support expansion and maintain a balanced and healthy workplace • Clear growth goals are designed, pursued, and evaluated
<p>4. Grow specialized metastatic services.</p>	<p>a) Develop a flexible passport with parameters that adapt to the needs of individuals with metastatic cancers</p> <p>b) Identify and incorporate modalities and supports that meet the specific needs of individuals with metastatic cancers</p>	<ul style="list-style-type: none"> • Tailored programs and services are developed and offered to individuals with metastatic cancers
<p>5. Strengthen supports and relationships with providers.</p>	<p>a) Develop a curriculum for providers about communications, ethics, working with fragile clients, end of life care, privacy</p> <p>b) Track and better understand the business models of providers, and how they might affect the partnership and service delivery relationship with Unite for HER</p> <p>c) Work with providers to gather and track demographic information about individuals served</p> <p>d) Work with providers to improve their capacity to respond to emerging needs, such as by sharing fieldwide best practices and/or results from Unite for HER’s evaluation and learning efforts</p>	<ul style="list-style-type: none"> • Consistent expectations among providers are set and met • Better understanding of the operations and needs of providers inform Unite for HER’s partnership strategies • Increased understanding of who is served by providers and how • Improved capacity of providers to respond to emerging needs

Goal III: Organizational Strength

Invest in the strength of the organization.

Key Objectives	Strategic Initiatives	Measures of Success
<p>1. Invest in staff.</p>	<ul style="list-style-type: none"> a) Invest in training and leadership development for all staff, including the completion of annual professional development plans, to ensure each individual has the opportunity to grow and maximize their talents and contributions b) Review and update policies and procedures c) Grow the team to fill current gaps in skills and capacities, and consistently update the organizational chart, roles and responsibilities of all positions, and communication flows d) Capture the aspects of the organization’s culture that work, and implement policies and practices that support a culture of learning, self-care, growth, and innovation e) Invest in technology and systems that support the work of the staff, and that will make it possible to increase and/or deepen services 	<ul style="list-style-type: none"> • Staff satisfaction, engagement, and retention remain high • Staff policies and procedures are reviewed and updated, as appropriate • The team is positioned to meet current and emerging needs, and reflects the diversity of the populations served • The organizational culture is healthy and supports positive impacts for individuals and communities • Technology and systems are in place that match programmatic and staff needs
<p>2. Invest in the Board of Directors.</p>	<ul style="list-style-type: none"> a) Assess what the Board of Directors needs to uphold best practices to maximize its stewardship of the organization, including composition, structure (Board and committees), training and learning interests, and implement a plan to address the needs b) Review and update policies and procedures, including expectations, recruitment, orientation, training, and other areas, as needed 	<ul style="list-style-type: none"> • Board members are supported, mobilized, and engaged, and reflect the diversity of the populations served • Board policies and procedures are reviewed and updated, as appropriate
<p>3. Strengthen Unite for HER’s ability to center diversity, equity, and inclusion in its work.</p>	<ul style="list-style-type: none"> a) Define and promote a shared understanding of diversity, equity, and inclusion for Unite for HER, and center diversity, equity, and inclusion in our organizational culture, policies, practices, staff, volunteers, and Board of Directors b) Set goals for diversity, equity, and inclusion for all levels of the organization, including the Board of Directors, staff, volunteers, policies and practices, and people served 	<ul style="list-style-type: none"> • Diversity, equity, and inclusion are held up as important values in our culture, policies, practices, and people, and are supported by clear goals for continual improvement

Key Objectives	Strategic Initiatives	Measures of Success
	<ul style="list-style-type: none"> c) Invest in internal capacities, such as skills and planning, to address issues of diversity, equity, and inclusion d) Evaluate all programs, products, and communications with a lens of diversity, equity, and inclusion to identify opportunities for improvements to ensure responsiveness and strategies that address disparities in access and outcomes 	<ul style="list-style-type: none"> • The organization demonstrates improved skills and planning related to diversity, equity, and inclusion • All programs, products, and communications are evaluated and updated, as appropriate, to ensure responsiveness and inclusion
<p>4. Complete leadership succession plans.</p>	<ul style="list-style-type: none"> a) Complete leadership succession plans for all staff positions b) Complete a leadership succession plan for the CEO and Founder to include the cultivation of competencies and skills in current staff, articulation of leadership qualities and skills needed in the CEO position, the role of the Board of Directors in a transition, and communications strategies 	<ul style="list-style-type: none"> • The organization is prepared for staff transitions, and succession plans are in place at all levels
<p>5. Complete a comprehensive business plan that supports growth.</p>	<ul style="list-style-type: none"> a) Complete a business plan, with a focus on fund diversification to build-out and implement strategies related to planned giving, partnerships, earned income (including HER Care Box and provider fees), vendor sustainability (e.g., Acure), diversifying donors, converting program participants to donors, and corporate sponsorships, that builds to five-year projected revenue levels (in place by 2023 at the latest) b) Identify the capacities, personnel, capital, and relationships that are necessary to scale-up targeted products and services; as appropriate, develop and implement strategies to pilot and/or scale-up targeted products and services c) Articulate the key priorities for investment and expansion, such as program focus areas, new personnel, and infrastructure 	<ul style="list-style-type: none"> • Business plan is completed, implemented, and reviewed on a regular basis • Opportunities and strategies for scaling-up targeted products and services are identified, defined, and tested

Key Objectives

Strategic Initiatives

Measures of Success

6. Position Unite for HER as a **thought leader**.

- a) Mobilize staff, volunteers, and the Board of Directors to ensure the organization is recognized as a thought leader, including but not limited to the CEO
- b) Identify other service providers and institutions that could amplify and/or replicate Unite for HER's approach; help them to strengthen their offerings by adopting or offering integrative therapies and track the outcomes
- c) Establish an Advisory Board of thought leaders who will contribute diverse perspectives and networks to Unite for HER, such as practitioners in the fields of medicine, integrative therapies, wellness, and policy

- Equip staff, volunteers, and the Board of Directors to position Unite for HER as a thought leader in the field
- Other service providers or institutions replicate Unite for HER's approach, and Unite for HER tracks expansion through replication
- An Advisory Board is established and leveraged to support Unite for HER as a thought leader