



Children's Surgery International

STRATEGIC PLAN | June 2020 – December 2023

Approved May 2020

MISSION (what good we do and for whom)

Children's Surgery International provides free pediatric medical and surgical services, along with professional education and training, to communities in need around the world.

VISION (what impact we seek; what happens as the result of this work)

To reduce global health care disparities by helping communities obtain the knowledge, skills, and tools to provide life-changing surgical and medical care for children.

VALUES (what guides our decision making)

- **Patient safety comes first.** We believe safety and high-quality care create excellent surgical outcomes, and we commit to utilizing advanced safety practices and knowledge.
- **Education maximizes impact.** We believe education and training of local medical teams builds self-sufficiency so communities can meet the needs of many more children in the future.
- **Collaboration begins with respect.** We believe partnerships with local practitioners and respect for their culture lead to better outcomes.
- **Volunteers change the equation.** We believe selfless gifts of time, talent and expertise from volunteers make it possible to multiply the investment of our supporters.

GOALS (what we must do to achieve our mission and vision)

1. Increase impact by improving the CSI program and delivery model.
2. Increase fundraising for growth and sustainability.
3. Improve operational effectiveness and efficiency.

OPERATING PLAN updated 7.7.20

#1: Increase impact by improving the CSI program and delivery model.

Strategy	Action Steps	Who	When
1a. Improve selection process and relationship with sites.	<ul style="list-style-type: none"> Develop site selection standards and criteria, including identifying potential educational partners. Establish and collect robust site information. Develop and pilot tool to collect baseline and post-visit data. Define and agree upon objectives with each site; meet with sites to agree to MOU. Evaluate success measurements annually. 	Medical & Mission Cmtee, Lisa	Dec 2020 2021+ ONGOING
1b. Build local medical leadership independence and confidence through enhanced education and training.	<ul style="list-style-type: none"> Establish checklist of clear, collaborative practices. Establish key site partners and maintain regular communications. Evaluate progress toward shared objectives and collaborative practices. 	Medical & Mission Comm., Lisa	Dec 2020 2021+ ONGOING
1c. Develop new and improve existing training for local medical teams.	<ul style="list-style-type: none"> Establish objectives and tools for training relevant local medical teams. Form work groups by discipline to refine curriculum. Identify and develop necessary tools and resources. Train CSI volunteers to use the tools. 	Medical & Mission Comm., Lisa	Fall 2020
1d. Pilot different and/or smaller trip models to supplement major trips.	<ul style="list-style-type: none"> Define need and/or opportunity we are addressing. Recommend alternative models to meet needs. 	Medical & Mission Comm., Lisa	2021+

Metrics

- Sites are able to provide baseline data and commit to measuring after our visit
- Number of procedures performed independently by sites increases (individual work groups such as nursing have learned the necessary skills/report greater confidence)
- Resources for local surgeons increase

#2: Increase fundraising for growth and sustainability.

Strategy	Action Steps	Who	When
2a. Build understanding of current donor base.	Analyze donor giving to establish baseline: reasons for giving, pattern of giving, etc.	Megan, Danny, Jen	Oct 2020
2b. Increase donor engagement to build greater investment.	Develop targeted cultivation plan for individuals that encourages multi-year pledges.	Megan, Dev Comm., Jen	Nov 2020
	Create top donor giving community.	Megan, Dev Comm.	Dec 2020
	Assess and develop events strategy; pilot new fundraising activities.	Megan, Dev Comm.	Dec 2020
2c. Improve communications to better highlight value of volunteer-driven model.	Develop messages to better tell our story to new, existing and potential donors.	Megan, Communications Comm.	Sept 2020
	Improve income and expense evaluation.	Finance Cmtee	Dec 2020
	Turn around year-end accounting prep more quickly to inform a compelling annual report.	Megan, Finance Comm.	Feb-Mar 2021
2d. Diversify revenue sources.	Expand giving from corporations and foundations (need to address how this will happen: research, etc.)	Megan, Dev Comm.	Dec 2020
	Launch formal planned giving program.	Megan, Dev Comm.	Feb 2021
2e. Recruit board and committee volunteers with fundraising connections and acumen.	Establish nominating committee to continually seed and succeed the board.	Exec, Comm., Full Board	Aug 2020
	Re-evaluate skill sets needed for board and key committees.	Nominating Comm.	Jan 2021

Metrics

- Reliance on gala reduced from 70 to >50% of revenue after 3 years; new activities piloted
- Donors renewed at 10% better than baseline (typical renewal)
- 5% increase in corporate and foundation giving (\$s and #s)
- 10% increase in individual giving
- Additional 5% of income from new activities
- Donors of \$100+ receive bi-monthly contact from organization
- Donors of \$1,000+ receive personal note, call, in-person meeting or special event 2x/year

#3: Improve operational effectiveness and efficiency.

Strategy	Action Steps	Who	When
3a. Improve governance.	<ul style="list-style-type: none"> • Improve board recruiting and onboarding. • Improve board monitoring of strategic plan, finances. 	Nominating Comm., Executive Comm.	Dec 2020
3b. Improve trip planning and execution.	<ul style="list-style-type: none"> • Establish robust trip planning tool. • Establish packing lists and procedures. • Investigate possibilities, procedures for acquiring controlled substances, prescription medication. • Develop and conduct formal trip evaluations and document outcomes. • Develop procedure to complete a post-trip financial analysis of expenses, income, supplies donations, etc. 	Lisa, Medical & Mission Comm.	Dec 2020 2021+ (pilot new procedures when travel resumes)
3c. Improve operations.	<ul style="list-style-type: none"> • Establish robust constituent database. • Develop organizational policies and procedures related to staff, volunteers and finances. 	Staff, Megan	Dec 2020
3d. Broaden and optimize volunteer engagement.	<ul style="list-style-type: none"> • Develop clear volunteer job descriptions. • Determine ideal size and composition of volunteer pool, including non-medical and research volunteers. • Develop plan with most consistent methods to recruit a deeper bench of trip volunteers and to assign them. • Develop engagement plan to optimize volunteer involvement. 	Staff, Medical & Mission Comm.	Dec 2020

Metrics

- Packing lists exist and are used consistently
- 10% increase in volunteer pool
- 5% increase in pool for hard-to-fill positions
- Post-trip volunteer survey shows high levels of satisfaction
- Annual reviews conducted for staff and executive director