Transplant Recipients International Organization, Inc.

Strategic Plan 2019

“A Plan to strengthen the organizational structure of Transplant Recipients International Organization for the purpose of sustaining TRIO’s support of its Mission.”

As approved at the TRIO Board meeting Oct 12, 2019
TRIO Mission

TRIO is a non-profit international organization committed to improving the quality of lives touched by the miracle of transplantation through support, advocacy, education, and awareness.
TRIO Vision

TRIO is widely recognized and respected as the leading voice of transplantation, representing donors, candidates, recipients and their families. Through the TRIO national office and a network of chapters and members-at-large (MALs), TRIO serves its members in the areas of:

**Support**
Providing support to transplant candidates, recipients, donors, and their families to help alleviate the stresses and problems associated with the process.

**Advocacy**
Making the concerns and needs that affect the welfare of transplant candidates, recipients, their families and donor families known to federal, state and local government bodies. Effectively communicating the views of transplant candidates, recipients, their families and donor families on issues in the field of transplantation and organ and tissue donation to the general public.

**Education**
Providing transplant candidates, recipients, donors, and their families with current information on developments in organ and tissue donation, transplantation, medications, social issues, and finances. Informing transplant candidates, recipients, their families and donor families on initiatives in the transplantation field by federal, state, and local government bodies.

**Donor Awareness**
Promoting organ and tissue donation as an important social responsibility. Developing and supporting mechanisms to improve the availability of organs and tissues on an equitable basis to meet the needs of transplant candidates.
Strategic Objectives

Objective 1. Grow Resources
- Human
- Financial

Objective 2. Enrich Communications

Objective 3. Support Chapter Health

Objective 4. Ensure Strategic Plan Effectiveness
Objective 1

Grow TRIO Resources
(Human, Financial)
Objective 1: Grow Resources

- Objective 1a: Grow Human Resources

  • **Strategy**: Define categories of TRIO ‘constituents’ by level of engagement
    (where ‘constituents’ is a general term inclusive of anyone TRIO can serve)

  **Level 1**: General public (anyone not covered in following categories)

  **Level 2**: General organ donors or transplant patients
    (not covered below)

  **Level 3**: Medical and OPO professionals
    (not covered below)

  **Level 4**: Constituents of TRIO interest w/o contact info
    4a: Dues paying members – local chapter
    4b: Dues paying members – MALs

  **Level 5**: Constituents with registered contact information
    5a: Dues paying members – local chapter
    5b: Dues paying members – MALs
    5c: Financial supporters
Objective 1: Grow Resources

- Objective 1a: Grow Human Resources

  • Tactical ACTIONS to Grow membership & constituency engagement
    – Identify interest needs of each constituent category
    – Define TRIO ‘value add’ to meet needs for each constituent category
    – Define ways to communicate with each constituent category
    – Identify ways to upgrade constituents to more engaged category level
    – Execute actions to support and engage each category level within TRIO resource limits
Objective 1: Grow Resources

- Objective 1a: Grow Human resources

Strategy: Grow membership base

Tactical ACTIONS: support chapters in growing their local membership

Develop chapter “best practice” document for retaining and engaging members based on work at 2012 Leadership Summit workshop (ref video of Sept 2012) with updates based on feedback from chapters and contacts made in this outreach process.
Objective 1: Grow Resources

- Objective 1a: Grow Human resources

**Strategy: Grow membership base**

**Tactical ACTIONS:** Grow the number of TRIO chapters

(note: currently there are 16 US and 1 international ‘Active’ chapters in various stages of ‘health’ ranging from thriving/growing to dying with little or no reported activity)

- a. Revitalize the existing “chapter development committee” with leadership and detailed plan of action
- b. Support local groups with a “chapter mentor” where potential for forming a new TRIO chapter exists, using the “ABC’s of Chartering a TRIO Chapter” as a guide
- c. Recruit and train TRIO members/leaders (such as chapter presidents and past presidents) to be “new chapter mentors”
- d. Invite “contact point” or “local support group” leaders to attend events such as Leadership Summits – on scholarship if they become dues paid TRIO members (MAL’s)
- e. Target: grow at least by one new chartered or recovered chapter each 12 months (ongoing time frame)
Objective 1: Grow Resources

- Objective 1a: Grow Human resources

  **Strategy:** Grow membership base (cont’d)

  **Tactical ACTIONS:** Grow the number of chapter members
  (note: currently 2018 chapter reported membership is 754; range in past 10 years = 930 to 751)

  a. Encourage growth by offering chapter with greatest percentage increase annually (by March 1st) recognition in newsletter, website and e-news; develop incentives/rewards such as payment of up to $300 for 1 member’s attendance at next board event

  b. Promote membership growth and incentives via newsletter, e-blasts, website, FB and Presidents’ Call.

  c. Target: increase membership 5% per year (40 in 2019/20), or approximately 10 new members each quarter

  d. Membership/Chapter Development committee to develop and track action plan in support of above actions for presentation at quarterly board meetings
Objective 1: Grow Resources

- Objective 1a: Grow Human resources
  
  **Strategy: Grow membership base (cont’d)**

  **Tactical ACTIONS:** Grow the number of members-at-large (note: 2018 MALs = 23, 2019 to date = 34; range past 10 years = 86 to 20)

  a. Improve targeted communications with MALs (i.e., send annual reminders to pay dues)
  b. Promote membership growth and incentives via newsletter, e-blasts, website, FaceBook and special MAL E-News
  c. Target: increase membership 50% per year (12 in 2019/2020), or approximately 3 new members each quarter
  d. Membership/Chapter Development committee to develop and track action plan in support of above Strategies for presentation at quarterly board meetings
Objective 1: Grow Resources

- Objective 1b: Grow Financial Resources
  - Strategy: Improve Financial Position and Stability
    • Tactical ACTIONS:
      – Increase overall “net income” annually by an average of 10% over 5 years
      – Continue tight control on operating expenses
      – Identify new projects that will attract funding like Transplant Presentation Library ($50k) - and Post Transplant Cancer ($75k)
Objective 1: Grow Resources

- Objective 1b: Grow Financial Resources

- Strategy: Improve Financial Position and Stability

  • Tactical ACTIONS:

  Increase overall “net income” annually by 10% over 5 year average (e.g. 10% over 2018’s $17k net income = $18,700 2019 net income)

  ✓ Increase dues revenue through membership growth
  ✓ Grow advertising revenue by 5% with new clients
  ✓ Grow grant revenue by 10% with support of grant research team and new grant writer role
  ✓ Investigate safe investment opportunities for funds not currently in use

  Control operating expenses

  ✓ Find grant sources to offload select budgeted operations
  ✓ Manage all projects within approved budgets (i.e. Leadership Summit, TPL: Transplant Presentation Library, PTC: Post-transplant Cancer project, other new initiatives to be developed)
  ✓ Finance committee to investigate ways to reduce current expenses with recommendations before each new annual budget is prepared
  ✓ Track actual income and expenses in relation to annual budget with quarterly reports to board and timely corrective action when necessary
Objective 2

Enrich Communications
Objective 2: Enrich Communications

- **Strategy:** to support the other Strategies/Tactical ACTIONs with effective internal communications to all members/constituencies
Objective 2: Enrich Communications

Strategy: develop/grow effective communications by constituency category identified needs

Tactical ACTIONS:

✓ Develop/maintain distribution lists by constituent engagement categories as appropriate (i.e., those with registered e-mail addresses),
✓ Ensure timely e-blasts (monthly to BoD, chapter presidents, MALs and general membership), and web communications
✓ Solicit member input through regular simple surveys (electronic Survey Monkey type tool/reports)
✓ Grow the TRIO web site content to make it a richer resource for member & chapter use
✓ Promote all communications to full TRIO member list through local chapter support and general outreach, growing the number and currency of member contact information (including e-mail addresses) in our membership database to ensure maximum penetration of messaging at least cost
Objective 2: Enrich Communications

Strategy: develop/grow effective communications by constituency category identified needs

Tactical ACTIONS:

✓ Solicit chapter/member activity photos for use in making all TRIO communications more member focused
✓ Implement plan to unify the quality, “look and feel” of all TRIO communications (“One TRIO”) with communication resource redesign etc. as needed
✓ Establish process of monthly personal phone call communication with chapter presidents by TRIO executive leadership (each assigned specific chapters to call, rotating assignments quarterly) with specific agenda – implement by <target date>
✓ Establish a network of “chapter champions” by key subject areas to provide direct updates to their chapter meetings/members on TRIO issues; solicit feedback from local chapter meetings/members for reporting back to National – implement by <target date>
Objective 3

Support Improved Chapter Health
For input to the Strategic Planning committee, the chapter development committee, in support of the Chapter Council Chairman (Steve Okonek), meeting bi-weekly to develop input for this Objective 3 currently focusing on these strategies/tactical ACTIONS . . .

Note: chapter development team: Gary Green, Jim Gleason, Steve Okonek, Elizabeth Rubin, Pati Hughes-Fudge, Sylvia Leach

1. **Determine the needs of individual local chapters**
   a. How to connect effectively with their leadership on a regular basis
   b. Survey (by call or e-mail) what challenges they are facing
   c. Ask about their chapter strengths, or what they are proud of that their chapter is doing well
   d. Asking how national can help them in their local mission

2. **Request updates to each chapter’s national website chapter pages**
   a. Note: Manhattan just updated theirs, most are severely outdated
   b. Identify their annual ‘signature events’ (if any, offer to add promos in monthly E-New and national web site for these)
   c. Offer to run stories (with a photo) about each chapter’s main events (‘signature events’) on web site and monthly E-News

3. **Brainstorm ways national can help local chapters address their identified challenges, such as . . .**
   a. Develop and schedule webinar events each focusing on one common chapter challenge for discussion
   b. Engage chapters with ‘best practices’ that overcome common chapter challenges as resources to contribute their experiences on the webinar events (panels?)
   c. Offer mentors to support chapters in need

4. **Relationship building**
   a. Ask how national can improve local member/chapter communications
   b. Promote committee membership opportunities to engage local members in national work, representing local chapter representation in national discussions
   c. Schedule follow up calls with chapter leadership on some regular basis to create continuity of support and relationship between chapter and national

Note: Currently team has reviewed and approved draft chapter data collection elements. A full implementation plan is being drafted for presentation to the board at our October meeting. Once board approved, each team member will accept individual assignments of 3 chapters to contact and discuss/record (target to complete and report back is 30 days) those items for developing into a central spreadsheet in support of the four areas listed above.
Objective 3: Support Improved Chapter Health

**Strategy: Increase membership engagement by improving TRIO services**

**Tactical ACTIONS:**
- ✓ Create and task an ad hoc **Member Services Committee (MSC)** with broad representation
- ✓ MSC to review existing and potential member services and their value to members by <target date>
- ✓ Solicit member input by conducting a new member survey to update results from that done in 2010 by <target date>
- ✓ Review survey results to determine possible additional services that meet the needs identified from the survey feedback by <target date>
- ✓ Develop plan and resources to launch new services based on MSC recommendations from this process by <target date>
- ✓ Measure member engagement after new services are added by <target date>
- ✓ MSC to report quarterly with recommendations for board discussion and action approval
Objective 4

Ensure TRIO’s Strategic Plan’s effectiveness
Objective 4: Ensure Plan Effectiveness

Strategy: make plan real and “living”

Tactical ACTIONS:

✓ Ensure strategic plan ACTIONS have target due dates and responsibilities assigned to a reporting individual

✓ TRIO president, Executive Director (ExDir) and Chapter Council Chair review plan vs. action milestones monthly

✓ Reporting to the board: Strategic Plan committee (i.e., Executive committee) to review quarterly by phone call producing a written report to quarterly board meetings of progress against plan and issues as they arise

✓ Maintaining Strategic Plan currency: Formal report and updated annual strategic plan to be developed by the Strategic Plan committee presented by the president for board discussion and approval at annual meeting (thus creating a “rolling strategic plan” to maintain focus and accountability in carrying out the current plan)