

Help Us Solve
The Cruel Mystery

LUPUSTM

FOUNDATION OF AMERICA
INDIANA CHAPTER

STRATEGIC PLAN

2022 – 2025

(Update of 2016-2019 Plan)

PREPARED BY:

Brad L. Romine

Tracey Horth Krueger

Dalton-Cole & Associates

Table of Contents

Mission and vision	3
Environmental scan	4
Strategic Planning Process	5
Strategy Overview	6-8
Strategies	9-15

THE LUPUS FOUNDATION OF AMERICA, INDIANA CHAPTER (LFA-IN)

Mission and Vision

Mission: The Lupus Foundation of America, Indiana Chapter (LFA-IN)) is dedicated to improving the quality of life for all people living in Indiana affected by lupus through research, education, support, and advocacy.

Vision: The Lupus Foundation of America, Indiana Chapter envisions a world without lupus. The organization will advance the science and medicine of lupus to find a cure and improve the quality of life for all people living in Indiana affected by lupus.

ENVIRONMENTAL SCAN

LFA-IN has 3 primary Foundation goals:

1. Increase and Diversify Revenue
2. Increase Public Awareness of Lupus and of the Foundation
3. Capacity building across our organization

A major component of the strategic plan was the process of gathering data from the LFA constituency. An effective strategic plan requires, as a first step, the collection of information, with analysis and development of issues. This analysis allowed your organization to understand your current situation, your current ability to meet your future mission and goals; identify trends and the needs of your constituents, and to help you become aware of changes in the characteristics of the population you serve. The data collection project was completed and a final report submitted to LFA-IN. This information was used to build a strategic plan that will allow LFA-IN to plan for future growth.

Current and Future Programs

Public awareness followed by information and educational materials ranked high on the list of current services from responses collected during the data collection project.

Yoga, academic seminars for medical professionals and a health navigator program, along with on-line support were identified as areas of interest for new programs.

An educational teleconference received strong response. Especially the topic of disability compensation and disability services information.

Educational materials currently provided seem adequate.

Support Services

Support services are beneficial to the LFA-IN constituency but need to be more accessible and perhaps available on-line.

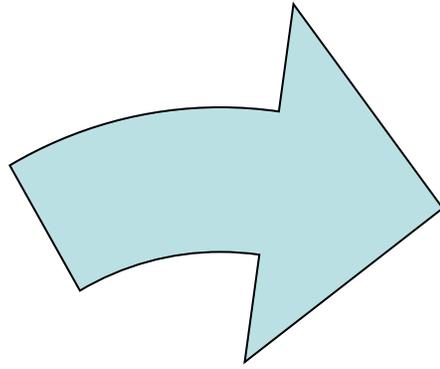
Public Awareness

Public awareness (marketing) should be enhanced.

Fundraising Events

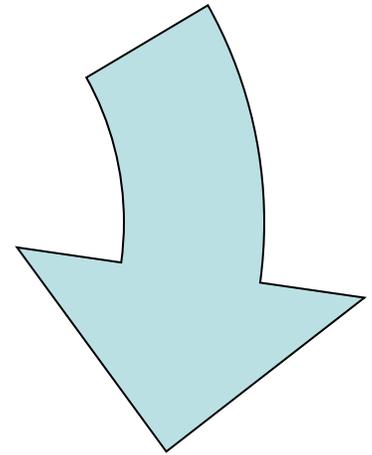
Fundraising events are well received. Projects should be enhanced to allow for greater participation where appropriate.

Review of
programs,
history and
mission



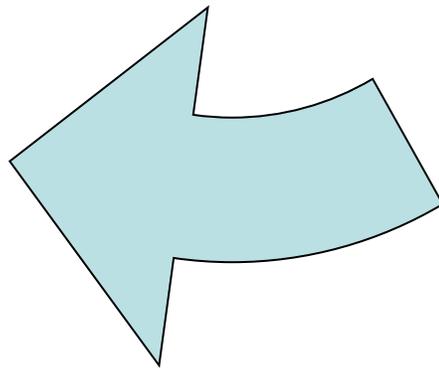
Data
Collection
from LFA-IN
Constituents

Strategic Planning Process



Board retreat.
Staff input
Board SWOT
session

Board of
Directors
approve plan



STRATEGY OVERVIEW

I. Board Governance

According to the National Council on Non-Profits, board members are the fiduciaries who steer the organization towards a sustainable future by adopting sound, ethical, and legal governance and financial management policies, as well as making sure the nonprofit has adequate resources to advance its mission.

The LFA-IN Board of Directors, in partnership with the CEO, will re-instate a committee structure which will actively work to advance the mission. The committees and the full board will hold themselves accountable by setting and adhering to scheduled meetings, have documentation of the meetings and report to the full board on the work. The board will ensure that the strategic plan objectives are being implemented.

From the data collection survey:

Most of the survey participants have not had an opportunity to interact with the Board. LFA-IN should develop strategies to better acquaint donors and supporters with chapter leadership.

II. Resource Development

LFA-IN will develop sufficient and diversified funding for existing and future services through comprehensive resource development planning.

There is a clear distinction between resource development planning and fundraising. Fundraising is *action oriented* and is concerned with directly generating revenues to keep an organization funded. Resource development planning is *process-focused* and concerned with ways to engage the community and other stakeholders in deliberately building the capacity of LFA-IN.

From the data collection survey:

Casino nights rank high in several of the surveys. Social media campaigns were mentioned in some of the geographic areas. Only in the Northeast did survey participants rank direct mail solicitations high. Other concepts that ranked high were golf events (Central Indiana) and big-ticket raffles. The concept of an on-line auction also ranks high in some areas, receiving as much as 85% support in Central Indiana and as high as 70% in some surveys in Northwest Indiana, for example.

III. Programs and Services

LFA-IN answers the needs of its clients through creative programming and services that not only help them feel better, but also provide opportunities to connect to other clients, family members and friends. The strategic plan outlines six new initiatives to be implemented over the next three years that could engage new clients and their families as well as increase the participation of current patients.

From the data collection survey:

The surveys were consistent across the board whether lupus patients or not, and no matter where they live: many feel the most important service is public awareness followed by information and educational materials. Virtually tied for the next important services were federal and state relations, fundraising events, and patient support groups.

Yoga classes and exercise programs rank consistently high and generally are the highest ranked services not currently provided by LFA-IN. Other potential services that rank high are academic conferences for medical professionals, health navigation assistance, and on-line support services.

One important factor – lupus patients feel health fairs are a more important service than non-lupus patients who rank health fairs low.

IV. Marketing

As an organization LFA-IN must identify and define the target brand image desired to communicate to the constituencies served. LFA-IN will want to improve general awareness about lupus and enhance marketing efforts for all chapter activities. Marketing activities should also include information about chapter leadership.

From the data collection survey:

Generally, awareness is seen as a weakness.

Many survey participants felt general awareness about lupus could be enhanced and the chapter needed to do a better job of promoting all chapter activities (i.e., fundraisers as well as awareness, support, and educational programs).

Most all the survey participants agree the newsletter has timely information about fundraising events. 50% of the survey responses in Central Indiana indicated the e-newsletter was easy to read with about 30% strongly agreeing the e-newsletter was easy to read.

V. Human Resources

Staffing decisions are among the most important decisions that nonprofit organizations make. Just as businesses and organizations of all sizes and areas of operation rely on their personnel to execute their strategies and advance their goals, so too do nonprofit groups. "An effective non-profit manager must try to get more out of the people he or she has," wrote Peter F.

Drucker in *Managing the Non-Profit Organization*. "The yield from the human resource really determines the organization's performance."

Volunteers have great value to nonprofit organizations. Recent studies indicate that approximately 100 million people volunteer annually with an estimated value of about \$150 billion. Volunteers often help a nonprofit organization save money but often provide services, increase contact with the community and make available better expertise. Their involvement often helps a nonprofit function better and reduces costs.

From the data collection survey:

Survey participants that have interacted with staff feel it was positive. Many focus group participants felt the staff did a very good job but was too small.

Board Governance

Goal: LFA-IN will have a vibrant, active board of directors charged with overseeing the organization and managing the implementation of the strategic plan.

Justification	The Board of Directors of the LFA-IN chapter is charged with governing and overseeing the affairs, funds, and property of the chapter. To that end, the board must adhere to best practices to ensure the organization is managed successfully and appropriately.
Implementation Steps	<ol style="list-style-type: none"> 1. Implement updated board of directors committee structure including: <ul style="list-style-type: none"> • Executive Committee comprised of Chair, Vice Chair, Secretary, Treasurer and Executive Director. • Governance. • Finance/Resource Development (this committee will be merged in the short term). • Programs and Services. • Marketing and Communications. 2. Draft mission statements for each committee and determine meeting schedules. Board members will serve as committee chairs and the committees can be populated by non-board members. 3. A board orientation will be developed and scheduled annually for new and current members. 4. Board recruitment policies will be developed. Recruitment strategies will be based on the current needs of the board in terms of actual capacity and needed areas of expertise. 5. An annual board assessment tool will be developed. 6. Committees will incorporate strategies from the board approved strategic plan into the committee work plans. 7. Committee updates will be provided to the full board at each board meeting.
Progress Indicators	<ul style="list-style-type: none"> • Year One <ul style="list-style-type: none"> ○ The updated committee structure is approved by the board of directors. ○ Committee chairs are identified and committee cultivation is underway. ○ Committee strategies/mission statements are developed and presented to the board. ○ The board orientation is developed and a session has occurred. ○ Board recruitment policies are developed. ○ A board assessment tool is developed and conducted. ○ Board recruitment policies are developed and shared with the board. ○ Committees are meeting and reporting activities to the board. ○ The Governance Committee has reviewed/updated bylaws and developed board cultivation strategies. • Year Two <ul style="list-style-type: none"> ○ Board conducts a review of the committee structure, goals, and strategies. ○ Committees are meeting and reporting activities to the board. ○ Board recruitment policies are reviewed and updated. ○ A board assessment is conducted. • Year Three <ul style="list-style-type: none"> ○ Board conducts a review of the committee structure, goals, and strategies.

	<ul style="list-style-type: none"> ○ Committees are meeting and reporting activities to the board. ○ Board recruitment policies are reviewed and updated. ○ A board assessment is conducted.
Primary Responsibility	Governance Committee, Executive Director

GOAL: Resource Development. Increase and diversify revenue

Justification	To increase the fundraising revenue so that LFA-IN plans for growth in both staffing and future activities.
Implementation Steps	<ul style="list-style-type: none"> • Recruit and train a resource development committee to include both board and non-board members. • Develop a funding model and written resource development plan to allow for future growth. <p>Recommendations for resource development plan based on data collection responses as follows:</p> <ul style="list-style-type: none"> • Maintain current special event fund raising walk projects in Northern and Central Indiana. • Add an on-line component to the Tasteful Affair event so supporters from around the state can participate and to increase overall revenue. • Develop an individual giving program as follows: <ul style="list-style-type: none"> ○ Conduct donor research as follows: <ul style="list-style-type: none"> ▪ Number of total donors. ▪ Increase/decrease of donors annual giving. ▪ Define donors as active, lapsed, and inactive. ▪ Age and gender demographics of donors. ○ Set goals for dollars to be raised <u>and</u> number of donors. ○ (2) Direct mail appeals to include a year-end appeal and one other direct mail appeal. Appeals through regular mail, social media and electronic. ○ Develop a major gift program seeking individual gifts of \$1,000 or higher for specific needs of LFA-IN. • Develop a formal corporate sponsor program to extend beyond sponsorship for events but also sponsorship/support for trainings, educational seminars, and other LFA-IN activities. • Develop a grants program as follows: <ul style="list-style-type: none"> ○ Conduct prospect research to develop a list of potential grant funders. ○ Match funders guidelines and objectives to funding needs of LFA-IN. ○ Create a grants management system to include name of funder, date of submission, primary focus. ○ Conduct face to face meetings with local funders, as appropriate to cultivate their interest and support of LFA-IN. • Conduct Board Training on the role and responsibilities of Board members to resource development. • Initiate a Board campaign with specific fund-raising goals for each LFA-IN Board member.
Progress Indicators	<ul style="list-style-type: none"> • Year One <ul style="list-style-type: none"> ○ Resource Development committee is recruited and trained. Committee is tasked with specific fund development goals. ○ Enhance A Tasteful Affair event by creating an on-line component to the project. ○ Develop a corporate sponsor program. ○ Funding model and resource development plan is completed and approved by the Board. ○ Conduct Board training on specific resource development topics.

	<ul style="list-style-type: none"> ○ Donor research completed and donors defined as active, lapsed, or inactive. ● Year Two <ul style="list-style-type: none"> ○ Implement the corporate sponsor program. ○ Develop an individual giving program to include direct mail, social media, and other electronic appeals as well as a major gift component. ○ Develop a grants program and conduct prospect research. ○ Conduct Board training on specific resource development topics. ● Year Three <ul style="list-style-type: none"> ○ Implement the individual donor program. ○ Implement the grants program. ○ Conduct Board training on specific resource development topics.
Primary Responsibility	Resource Development Committee, Board of Directors, Staff, and Consultants

Programs and Services

Goal: LFA-IN will meet the needs of patients, families, friends and caregivers through innovative programs and services that keep them connected and informed, as well as helping them feel better.

Justification	LFA-IN patients, families, friends and caregivers, information have indicated the need for innovative programming that helps patients feel better physically and helps them navigate what can be a complicated health care system. In addition, patients are requesting creative ways to access services and support groups.
Implementation Steps	<ol style="list-style-type: none"> 1. Recruit the Programs and Services Committee in partnership with the Board of Directors. 2. Determine the financial and programmatic impact of two NEW programs/services to be implemented in Year One, then two more in year two and again in year three. Some of the suggested programs from the data collection phase of the strategic plan include: <ol style="list-style-type: none"> a. Free yoga lessons – an exercise proven to help lupus patients. b. Health navigator – to help address any clinical issues the patient might have or removing barriers to care. c. Financial assistance program - including utilities, rent, mortgage payments when an eviction is imminent. d. On-line support/telephone conferences – helpful to those with transportation issues and/or are hesitant to attend support groups. This also includes webinars and other educational opportunities. e. Partner volunteer program – where a patient is paired with a volunteer advocate who will help the patient connect with doctors, advocate on their behalf and help get them to medical appointments. f. Academic conferences for medical professionals featuring topics to be determined by LFA-IN. 3. Following the financial/programmatic analysis, prioritize implementation order and develop pilot programs for Year One. 4. Recommendations made to the Board of Directors for approval. 5. Annual review to include patient participation, staff time, financial impact and patient evaluations.
Progress Indicators	<ul style="list-style-type: none"> • Year One <ul style="list-style-type: none"> ○ Committee is formed and meeting. ○ Financial/programmatic analysis is completed and strategies are prioritized. ○ Pilot programs are implemented. ○ Evaluation has started. • Year Two <ul style="list-style-type: none"> ○ Committee continues to meet. ○ Two more programs/services are implemented. ○ Evaluation on Year One programs continues. ○ Evaluation on Year Two has started. • Year Three <ul style="list-style-type: none"> ○ Committee convenes stakeholders to learn what, if any, additional programs should be considered. ○ Two more programs/services implemented. ○ Evaluation on Year One and Year Two programs continue. ○ Evaluation on Year Three has started.
Primary Responsibility	Program and Services Committee, Executive Director, Board of Directors

Marketing

GOAL: Solidify the LFA-IN brand and identify LFA-IN as a resource to patients and the medical community, as well as family, friends and caregivers of persons living with lupus throughout Indiana. Develop techniques to help make constituents and supporters more aware of LFA-IN and its programs and services and other activities and help to educate the general public about lupus.

Justification	Based on the recent data collection project, many LFA-IN supporters and constituents indicated the Indiana chapter needs to improve the promotion of its programs, services and other activities to lupus patients, families, friends and caregivers. In addition, survey responses suggested enhanced communication with the medical community would be beneficial as well as general awareness about lupus.
Implementation Steps	<ol style="list-style-type: none"> 1. Recruit a task force to create a comprehensive marketing plan. 2. Develop a plan which will increase the visibility of LFA-IN. 3. The plan will: <ul style="list-style-type: none"> • Create techniques to promote the programs and services, fundraising events, and other activities of LFA-IN. • Use texting technology to reach out to constituents about educational programs, support groups as well as fundraising events and other activities. • Take advantage of all social media platforms. • Continue publishing an e-newsletter. • Lupus Now magazine available to supporters. • Include general awareness information about lupus. 4. Board of Directors will approve the marketing plan. 5. Marketing plan implemented. 6. Board of Directors receives regular updates on progress of plan implementation. 7. Plan is reviewed annually for adjustments and necessary changes.
Progress Indicators	<ul style="list-style-type: none"> • Year One <ul style="list-style-type: none"> ○ Task force appointed. ○ Marketing plan is created. ○ Board of Directors approves the marketing plan. ○ Techniques for implementation are researched and developed. • Year Two <ul style="list-style-type: none"> ○ Marketing plan is implemented. ○ Marketing plan updates provided at regularly scheduled board meetings. ○ Marketing plan is reviewed and adjusted as needed. • Year Three <ul style="list-style-type: none"> ○ Marketing plan is evaluated. ○ A new 3-year marketing plan is created.
Primary Responsibility	Marketing task force, Executive Director, Marketing consultants/contractors, Board of Directors

Human Resources

GOAL: Human resources: volunteers and staff

Justification	<p>Appropriate levels of staffing are critical to the success of the strategic initiatives. To fulfill the goals and objectives of the organization, additional staff may be required.</p> <p>Volunteers fulfill a very useful role, and they bring expertise and resources to various projects and initiatives.</p>
Implementation Steps	<ul style="list-style-type: none"> • Recruit an ad-hoc committee from the Board of Directors to focus on Human resources: both staff and volunteers. The committee will create a plan to: <ul style="list-style-type: none"> ○ Develop a training program for volunteers including: <ul style="list-style-type: none"> ○ Special event volunteers to improve customer service at events. ○ Patient support services other than support group leaders. ○ Recruit and train key volunteers in communities around Indiana. ○ Enhance volunteer recruitment through social media, e-mail, communications and at LFA-IN events. ○ Review goals and objectives of LFA-IN approved strategic plan and recommend an appropriate staffing level for LFA-IN which may include: <ul style="list-style-type: none"> ○ Resource Development Assistant. ○ Grant writer (i.e., contract position).
Progress Indicators	<ul style="list-style-type: none"> • Year One <ul style="list-style-type: none"> ○ Ad-hoc committee is recruited. ○ Human resources plan is drafted and approved by the Board of Directors. ○ Volunteer recruitment is enhanced through various communications and at LFA-IN special events and projects. • Year Two <ul style="list-style-type: none"> ○ Volunteer training programs are implemented. ○ Key volunteers are recruited and trained to serve as LFA-IN contacts around the state of Indiana. ○ Patient support volunteers are recruited and trained. ○ Finance and Executive committees develop a strategy to fund any additional staff positions outlined in approved Human Resources plan. • Year Three <ul style="list-style-type: none"> ○ Staff is expanded as outlined in Human Resources plan. ○ Human resources plan and all training programs are evaluated for effectiveness and necessary updates.
Primary Responsibility	Ad-hoc committee from LFA-IN, Board of Directors, Executive Committee, Executive Director