



HEALINGCALIFORNIA

STRATEGIC PLAN

2020 -2025

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Summary

Healing California is a new organization dedicated to providing free, quality dental, vision and medical care to those in need in California. In just two years of operating, we've successfully hosted 25 clinics and provided more than 4,000 patients with over \$1.6M worth of health care. We currently have five full-time staff, seven Board Members and more than 500 volunteers in our network. Our reputation with our existing clinic and community partners is excellent, and we are committed to increase our patient impact across the state by focusing on the following areas and strategies for growth and sustainability.

Growth

Within the next three to five years, Healing California aims to ensure that a minimum of 40% of clinics are in rural regional areas of California. We will strategically leverage partnerships to most efficiently and effectively serve the most people. We will also build a volunteer pipeline and staff resourcing plan that aligns with our next stage of growth.

To achieve these goals, we have set the following objectives to be achieved within the next 1-3 years:

We will align funding needs for our targeted growth, increase volunteer support from across the state for areas with no local infrastructure, hold concurrent clinics, prioritize our functional needs based on growth objectives, and strengthen our culture to be responsive, welcoming, and transparent. We will work to develop our people to their fullest potential.

We have set a goal to increase the number of individuals served and the value of service by 25% over the previous year.

To be successful meeting these objectives, we acknowledge that Healing California may need to consider hiring professional medical staff to adequately ensure service delivery in these rural locations. We also know that relationship building within these communities and finding local expertise and partnerships will be critical to increasing our capacity. Any increases in staff will be driven by the growth we are able to achieve, and we will ensure the training and development of new and existing staff is appropriate and aligned to growing individuals into higher functional roles.

Development

The primary goal for development in the next three to five years is to ensure diversified funding streams.

To achieve this goal, we will develop and implement a clearly defined strategy for increasing the diversity of individual giving as well as institutional funders within the next 1-3 years.

Elements of the strategy to diversify individual giving will include leveraging board member networks through one-on-one meetings as well as through stewardship events. We will allocate dedicated staff for prospect research and establish a variety of giving levels that are appropriately aligned to revenue targets. We will build our social media platforms and strengthen our online giving presence, work on building legacy and planned giving opportunities, and set naming opportunities for capital projects.

To diversify our institutional funding, we will create corporate benefit packages based on proposed engagement, research and build a prospect and solicitation list, and allocate a dedicated staff person to grant writing, reporting and other assigned development duties.

Partnerships

Within three to five years, Healing California will have developed strong relationships with local providers, partnerships with state-wide professionals' societies and Universities to grow our volunteer network, strengthen our visibility in the community, and optimize the utilization of our equipment.

Within the next 1-3 years we will develop patient continuum of care relationships for all clinics, including establishing partnerships with on-site medical providers. We will also have a prioritized target list for community organizations to approach for partnerships, create Memorandums of Understanding with all partners (as appropriate) including equipment sharing opportunities, and create a menu of benefits to encourage partner engagement. We will have a conference and expo calendar for 1-3 years to help increase exposure and diversify partnership opportunities. We will deepen our relationships with local dental and optometric professional societies and school partners, to align with our growth objectives.

Marketing and Awareness

We will increase brand awareness, measure our efforts and develop a clear brand identity guide for all marketing and external communication within the next three to five years.

We recognize that marketing and brand awareness are key to increasing our community partnerships, volunteer network, and achieving our overall growth and development goals. As such, we need to increase public and provider awareness of Healing California and its services as a statewide community resource over the next few years.

To achieve an increase in brand awareness, Healing California needs a plan which includes: utilizing consistent messaging, optimizing SEO strategies, a social media engagement strategy on all platforms, consistent web audits and updates, established brand ambassadors, signage, digital and printed marketing materials, a PR and Media strategy, a conference and expo calendar, and personnel dedicated to these efforts.

All these elements should align to the brand practices and identity set by the marketing committee, ED, and board.

Policy and Advocacy

Healing California will establish a process to continually be aware of changes in state policy as it relates to our work. We will establish a reputation as a thought leader in providing free, quality, mobile dental and vision care within the next three to five years.

To achieve these goals, Healing California will develop partnerships with state institutions to share our impact as data for research, participate in statewide convenings on health reform, provide responsive engagement with legislative questions, and establish a patient advisory board. Part of this process will be to continuously determine the impact of policy changes on Healing California and our work, to circulate this information to relevant stakeholders including the board, and to leverage the circulation of this information to contribute to public knowledge, reinforce our reputation and move the conversation on the importance of accessible healthcare for all.

Volunteers

Within the next three to five years we will establish lead and back up volunteers for each region of service, increase overall volunteer engagement, and continue to ensure we are providing an exemplary volunteer experience.

We will continue targeted outreach, local marketing, and consistent and ongoing communication with our volunteers over the next 1-3 years to help build our volunteer network. We further commit to implementing a standard of care committee to assess and improve upon patient care and the overall volunteer experience at Healing California.

Volunteer engagement and recruitment may require engagement with local media influencers and paid advertising, and will include personalized communications, such as thank you letters from the Board of Directors or ED, consistent e-communications, post-event feedback surveys and social media spotlights.

Additional opportunities for further engagement may also include co-sponsored events with volunteer offices, considering a stipend for volunteers who have a hardship in participating, and training and perks (such as meals and swag) during volunteer experiences. All of this will be captured within a detailed volunteer stewardship plan, which outlines the process from volunteer registration through post-engagement.

Assessment of 2018 Plan

The following is a summary of the primary goals listed in the 2018 Strategic Plan and the assessed to date outcome against these goals as of January 2020.

1. In 1-3 years, we will have 60% of our yearly operating budget from foundation and institutional support – Behind
2. In 1-5 years, we will increase our board members skills and expertise – On Track
3. In the next 1-3 years we will establish a pool of reliable volunteer leaders – Behind
4. Within 5 years we will have backup lead volunteers for every region – Behind
5. Individual giving will be 40% of the budget - Behind
6. 15% of volunteers will be making a philanthropic gift – Behind
7. Within 3-5 years we will have an active board of 7-11 members representing wide diversity of expertise and skills which enhance the work and the mission – On Track
8. Will be recognized as one of the most exemplary volunteer experiences – On Track
9. Our board will have the capacity to develop our Programs, HR, and Operations – On Track
10. Within 3-5 years we will have an extremely diverse funding stream – Behind
11. Within 3-5 years we will have a ‘right-sized’ staff – On Track

SOAR Outcomes

Strengths

- Nimble – Mobile
- High immediate impact services
- Quality
- No strings attached
- Good staff
- Engaged Board
- Young non-profit
- Operationally Sound
- Staff-multitask/good cross training
- Good City/Urban Coverage
- Small/Good Volunteer Base (Dedicated)
- Commitment to good governance
- Core team experienced
- Empower volunteers and post support stewardship
- Team players
- Retention is strong
- No bridges burned

The following elements of the SOAR Activity were ranked in priority order from A to C. A represents highest priority, B is next highest priority, and C is important but not high priority or unchangeable. Next to each of the listed elements in parenthesis are the rankings.

Opportunities

- Increased linkage with local providers
- Marketing-expanding presence and brand-building
- Untapped funding
- Partnerships with statewide trade groups/professionals
- Equitable volunteer coverage at stand downs
- Expansion with community based nonprofit organizations
- Clinics for children and youth experiencing homelessness
- Expansion of diagnostics/medical
- Advocacy and legislative change
- Language Support
- Partnerships with Government

Aspirations

- Be well known enough to be a 'safety net' recommendation
- 50 clinics/1 clinic per week within 2-3 years
- HC is a "why can't we be like that" Charity. An example of good governance, fundraising, HR, and Standard of care
- Expanded access across the state
- Diversity of Service Provision – vans vs brick and mortar
- HC's work 'moves the needle' on policy discussions/decisions within CA

Results (All of these items are currently being tracked and were all marked as A priorities)

Internal Metrics:

- Program outcomes
- Volunteer Retention
- Feedback Survey
- Cost Per Patient declines
- Impact Increases (Number of people served, Number of Clinics Delivered)
- Diversified Funding Streams
- Donor Retention
- Increase in all Funding Streams
- Staff Retention
- Board Retention/Growth

External Metrics :

- Number of patients
- Patient retention
- Community Partnerships
- Name Recognition
- Accolades (awards)
- Media Coverage
- Website Traffic
- Marketing Metrics

Medical (1-3 years)

- Health Screenings including physical exams and addressing chief complaints
- Portal to care plus one-off support opportunities
- Screening and referrals

10 Year Dream Big Goals

1. We want to effect policy and systemic change when it comes to accessible healthcare for all
2. We want to offer a robust franchise model (nation-wide)
3. We want to explore international operations -- Healing without borders
4. We want our equipment use optimized
5. 100% of people without access in CA are served at least once a year
6. Network of brick and mortar/vans/pop-up clinics
7. Effectively leverage technology to enhance efficiency and effectiveness
8. A brand that is synonymous with high quality dental, vision and medical care
9. Medical nonprofit gold standard with training program for others
10. 100,000 patients served