

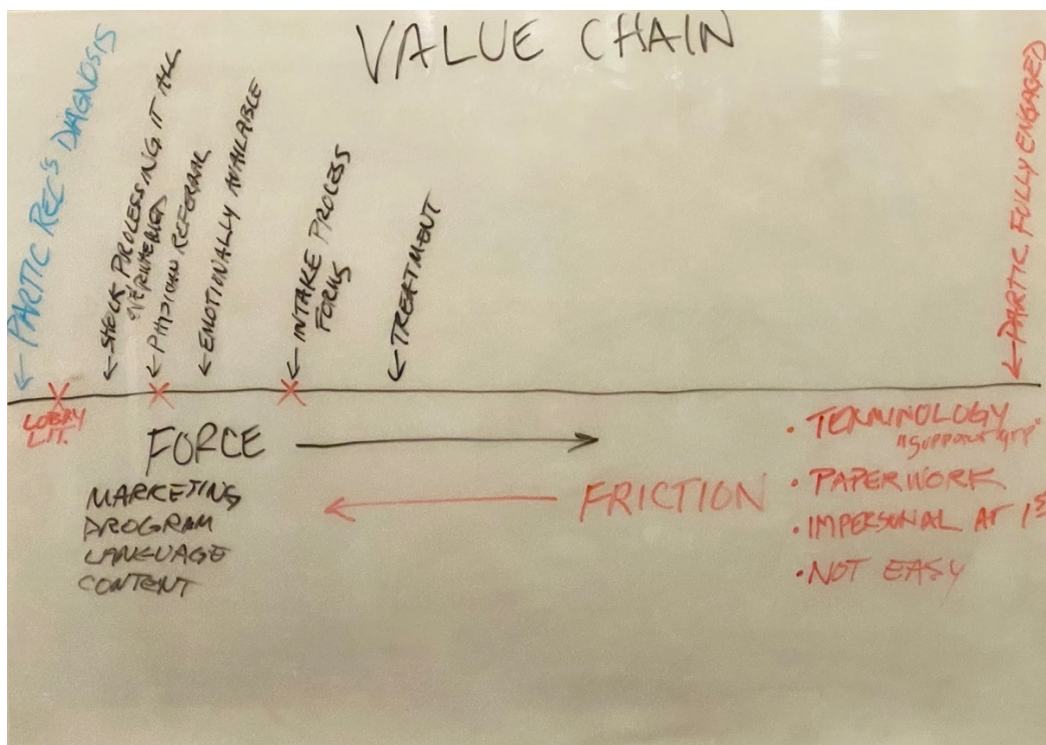
Cancer Support Community, CA Central Coast
Strategic Plan Refresh
May 20, 2023
Facilitator: Cal Stevens

Objective: To refresh the existing CSCCCC strategic plan, amending where necessary, to address the work of the organization over the next 5 years.

Envisioned End-State: What is the target, i.e., what do we want CSCCCC to look like in five years? These are the attributes and outcomes of our work toward which we design our strategies today.

- New and more participants, of multiple kinds, availing themselves of our services
- Our office is active, busy
- Previously non-participating demographics are showing up (e.g., more men, younger people, busy people, etc.)
- Everyone knows who we are, from among the medical community and the public in general
- Full programming
- Full staffing
- Delivering value to participants thanks to increased staff capacity (greater numbers of staff with increased skills) and quality content in the programs

Value Chain Exercise



The value chain intends to chart the delivery of the organization’s value from the earliest event that might signal a need, in this case a potential participant’s cancer diagnosis, then proceeding across a timeline of sequential events until the participant is fully engaged in CSCCCC services. A few of the intermediate events were identified, though there are likely others:

- Participant’s shock in processing the news, feeling overwhelmed
- Physician referral
- After a time, the participant may become more emotionally available
- Participant begins intake process, faces the forms
- Participant receives medical treatment

The board members present began to identify inflection points where CSCCCC touches the potential participant. There are more events and inflection points to chart, but the concept of the value chain, once understood, began to engage the board in a consideration of the dynamics involved with the participant experience. The things that drive toward participant engagement are “forces” like increased marketing, heightened appeal of programming, persuasive language about benefits of our services and higher quality of program content. But the “friction” dynamics were things that make potential participants not engage: off-putting terminology (like “support group” conveys scary vulnerability, especially for men), intimidating paperwork, an impersonal approach for some at the start, and how it’s not always as easy to engage the organization’s programming as it should be.

This discussion resulted in the addition of **Redesign the Participant Experience** as a strategy for the organization. It was placed as the #1 priority of four total strategies over the next five years.

Plotting Strategy Outcomes: The board considered the existing strategies (from 2021) to see if they would produce outcomes that would achieve the envisioned end-state.

	Strategies	Intended Outcomes
New	Redesign the Participant Experience	Higher participation and participants get more out of the program
From 2021 Strategic Plan	Increase community awareness	More participants, increased confidence, literature saturation, brand awareness
	Increase Diversify ¹ funding	Long-term giving, grants
	Program: <ul style="list-style-type: none"> • Infrastructure and Collaboration with outside program partners • Maintenance and expansion • Expansion to next level² 	Increased quality of programming Increased awareness Increased partnerships Diverse participant needs met Larger demographic footprint among participants

¹ This change made in the meeting to clarify the point: Not just more money, but from a wider array of sources.

² These were previously three separate strategy items and the board suggested collapsing them into one.

The four Strategies' Sub-goals and Actions. With each strategy, the format is to determine the sub-goals under each one, and then the actions required to accomplish them. However, the board determined to work exclusively on only one of the four, **redesign the participant experience**, during the remainder of the meeting. This was justified because they considered the older three strategies were already underway and the goals and actions for each are already known. They also considered that these could be re-visited later for any needed modification, whereas the new strategy around **participant experience** had captured the board's enthusiasm as being more centrally relevant to what CSCCCC should do next.

Strategic Plan 2023-28

1: Redesign the Participant Experience		Owner	Phase
Completely Understand Participants			
	Survey all participants, but also all potentials who did not sign up (why?), all contacts, to understand all barriers, needs, and expectations; collect data, report out	CS	1
	Review scholarly and industry literature on similar campaigns, benchmarking; this plus the survey data should show how to shape all recruitment and onboard processes for ease-of-entry	CS	2
	Design all processes for the agile capacity for change in response to ongoing input from participants, the "participants' voice" is a design element for CSCCCC processes	CS	3
	Create an ongoing system re-design capability based on what we learn about participants.	CS	3
Design All Processes for Participant Experience			
	Streamline for ease-of-entry (onboarding), define participant levels of commitment so it's easy for each to control their level of involvement	HS	1
	Build warmth and personal touch into all processes	MM/JW	1
	Streamline physician referral process	SB/MM	1
	Define participant touchpoints (entry points, e.g., 1-on-1 meetings, group attendance, etc.)	JW	1
	Re-design physical space (warm, welcoming, professional)	All	3
	Design and implement training for everyone representing the organization re terminology, listening, responding skills (with outreach committee)	HS/CS	2.5

CS= Candice Sanders
 HS= Heath Shephard
 MM= Marci Miller
 JW= Jessica Wheeler
 SB= Shannon Berry

1: Year One (2023-24)
 2: Years Two-Three (2024-26)
 3: Years Four-Five (2026-28)

The following is reprinted from the 2021 strategies and repeat the tasks determined at that time. These need updating in light of current work, and the status of owners and phasing.

2: Increase Community Awareness		Owner	Phase
Educate public about CSC Goals/Mission			
	Use annual report and branded materials as a vehicle for educating the general public, previous patients and families, etc. about the need for continued support. Utilize multiple touch points, including distribution to initial mailing list, distribution to estate planning attorneys, and distribution at all CSC events.		
Increase educational messaging			
	Educate the general community and potential givers about local support needed to keep CSC going (volunteering, giving, ambassadors, etc.)		
	Action step 2a: Create a "speakers bureau" - a group of board members, volunteers and staff who can all feasibly be trained and deliver a presentation at a community club, senior center, etc.		
	Action Step 2b: Plan and train the recruited "speakers bureau" volunteers		
	Action Step 2c: Connect with supporters to strategically booking speaking engagements in the community		
	Action Step 2d: Foster the Professional Advisory Committee to expand reach of message – connect to PAC quarterly and split into advisors / bankers and medical		
Increase marketing and social media			
	Use marketing opportunities to generate wider community awareness.		
	Action Step 3a: Utilize and maximize radio spots, parades, concerts in the park, health fairs, chamber mixers, etc. to expand brand awareness. when safe to do so		
	Action Step 3b: Increase social media program marketing with weekly social media updates		
	Action Step 3c: Create and distribute educational videos		
Expand staff role to support outreach, marketing, event volunteer recruitment			
	Action Step 4a: Hire support staff with greater availability		

3: Diversify Funding		Owner	Phase
Diversify Funding			
	Action Step 1a: Research and education around how to build a more diverse, sustainable income stream and report back to a Fund Development Committee - update: grants, long-term giving, work-place giving.		
	Action Step 1b: Enroll staff member in training to support long- term gift cultivation		
Create a Fund Development Committee			
	Action Step: Recruit/populate a Fund Development Committee responsible specifically for this task (not just events, etc.)		
Connect with Community Foundation			
Increase program funds through grants to support program expansion.			
	Action Step 4a. Get staff training on writing successful grant proposals		
	Action Step 4b. Secure at least one major grant (over \$10,000)		
Create large donor database as recommended by CSCHQ and take classes to court them properly.			

4: Program Infrastructure, Collaboration, Maintenance and Expansion		Owner	Phase
Maximize staff and program volunteer time with current resources and skills			
	Action Steps: Explore program structure, roles, responsibilities, and considering where more resources would be most helpful.		
Increase Community Collaboration			
	Action Step 2a: Explore potential partnerships for capacity building: Ameri-corps, CHC, Tenet, Hearst, Community Foundation (bi-annual)		
	Action Step 2b: Outreach expansion to collaborate for mental health with Community Foundation		
	Action Step 2c: Refer to / collaborate with dietitians for Nutritional Support		
	Action Step 2d: Collaboration with oncology Social Worker, Physicians, patient counselor		
	Action Step 2e: Collaboration with Wilshire Community Services and CCHH to expand programming		
	Action Step 2f: Update Community Resource binder and e-binder to support collaboration ideas and expansion of collaborative services for participants		
	Action Step 2g: Update programs and resources, including website to focus on virtual resources		
Increase Medical Incoming Professional Referrals			
	Action Step 3a. Partner with more medical practices and increase physician awareness of services		
	Action Step 3b. Reach for more referrals from diverse professionals ie. Psychologists, counselors, attorneys, diagnostic centers		
	Action Step 3c. Increase referrals incoming referrals for virtual services		
Program Development			
	Action Step 1a: Provide short-term individual counseling services for patients and families in person or on-line through Zoom		
	Action Step 1b: Sustain variety in support groups and evaluate and adapt each group when needed		
	Action Step 1c: Offer a variety of social and wellness programs like: Art, music and pet therapy – virtual as needed		
	Action Step 1d: Latino Program / Group – support the growth and education of this group		
	Action Step 1e: Refer participants to outside resources like: nutrition, health insurance, counseling beyond our scope		
	Action Step 1f: Plan and recruit speakers to provide monthly education on a variety of appropriate topics		
	Action Step 1g: Support children and families affected by cancer through education and social events – virtually as needed		
	Action Step 1h: Promote and select recipient for scholarships for families affected by cancer, seeking higher education		
	Action Step 1i: Explore program expansion as recommended by CSCHQ like: Cancer Transitions Programs and Open to Options from CSCHQ		
Do an annual assessment / statistics			
	2a. Assess program attendees to find grassroots ways to grow that support our own participant's needs		
	2b. Complete statistics for CSC-CCC and CSCHQ reporting in a timely fashion		
School Outreach			
Collaborate with large organization outside our area to bring in new ideas, ie national speakers, comedians, experts or thought leaders			