2024-2027

STRATEGIC PLAN

PREPARED AND PRESENTED BY

COLLABORATIVE STRATEGIES CONSULTING INC.

ABOUT THE FOUNDATION

OUR MISSION

The Chinook Regional Hospital Foundation raises funds and stewards the use of the donations to support healthcare services that are needed in our community.

OUR VISION

Our Vision is for a healthy community that has access to outstanding healthcare.
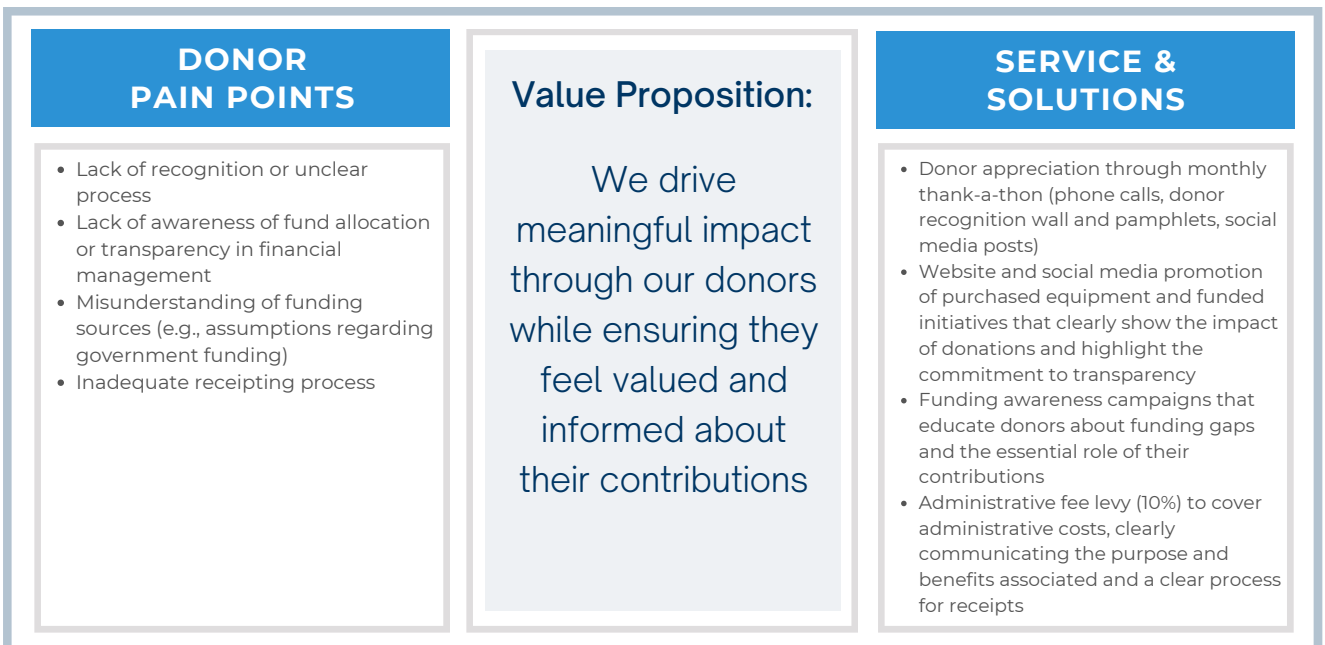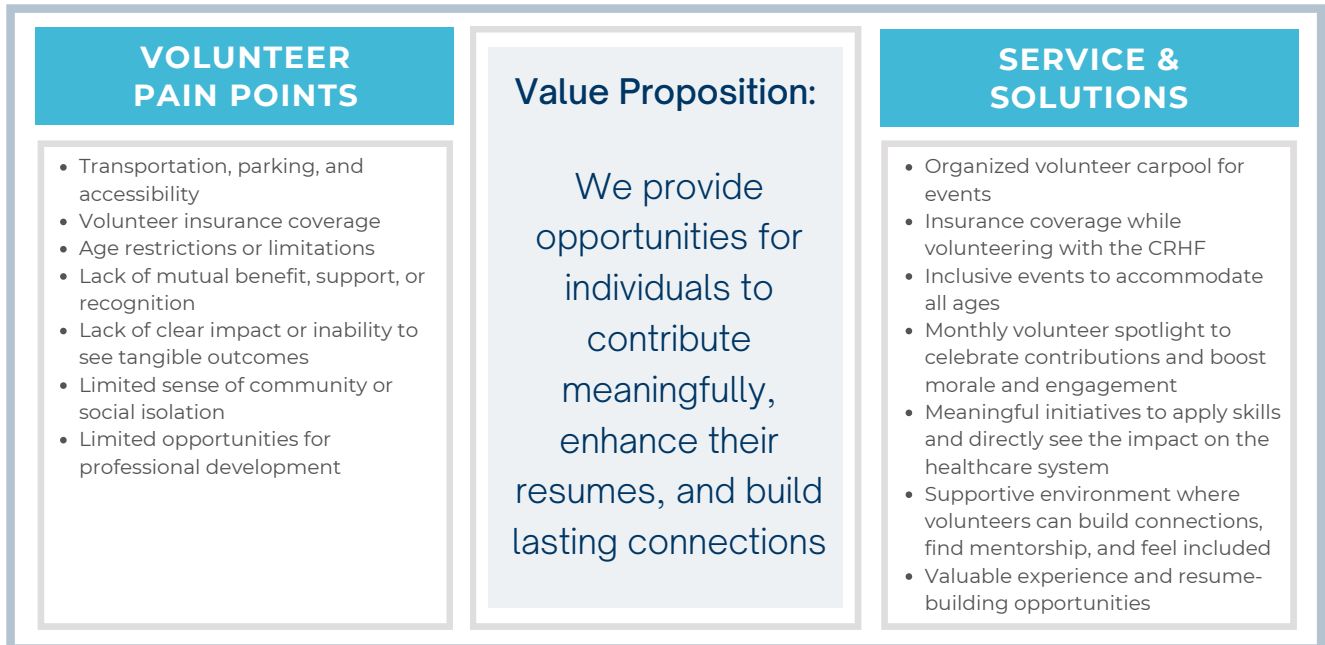
OUR CORE VALUES

- **Stewardship of Funds** - We practice responsible planning and management of the donors' gifts and we communicate the use of the gift to the donor.
- **Accountability** - We value the ability of our board, staff, and Foundation to honour our commitments, to donors, stakeholders and to each other.
- **Professionalism** - We are committed to meet our obligations by positively influencing the health of our community.
- **Code of Ethics** - We adhere to high ethical principles: truthfulness, fairness and doing what we say we will do.
- **Compassion** - We understand the sociocultural, psychological and economic influences on people's lives in their environment.
- **Care** - We demonstrate concern, empathy and consideration for the needs and values of others.
- **Excellence** - We embrace advancement, challenge mediocrity, and work toward the development of new knowledge.
- **Safety** - We have a shared belief among the board, staff and volunteers that safety is a way of life
- **Teamwork and Collaboration** - We develop and nurture partnerships that add value to the Foundation.
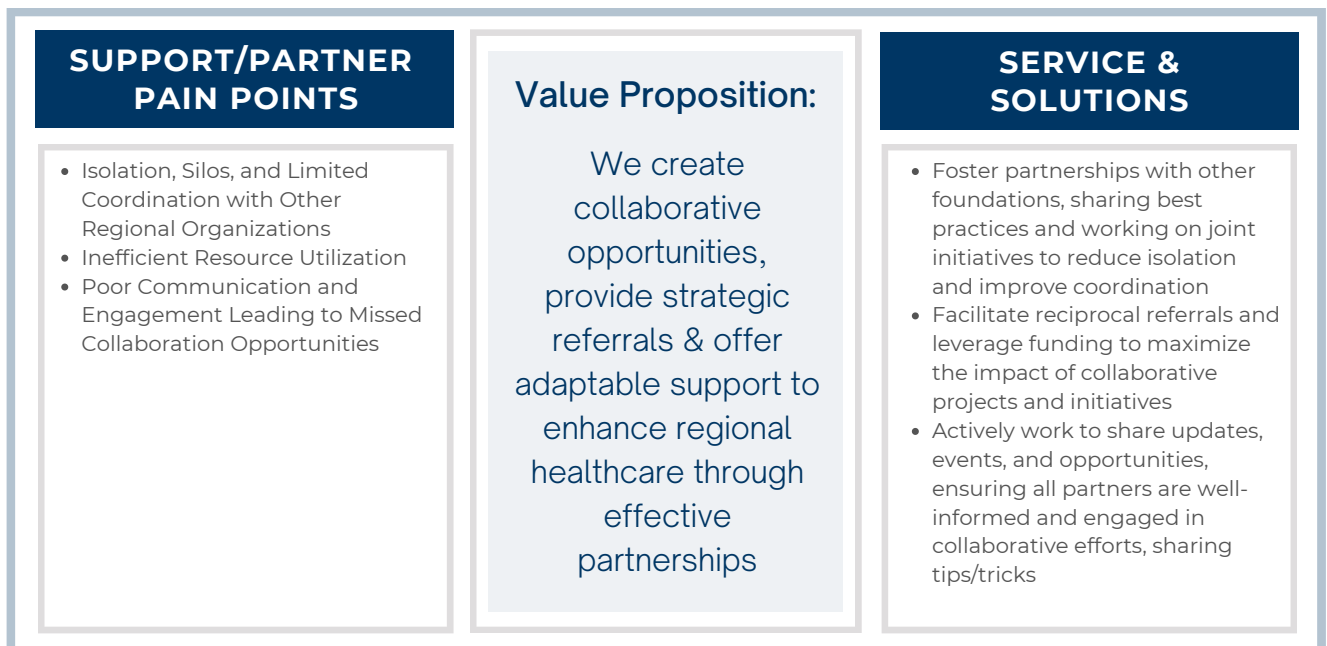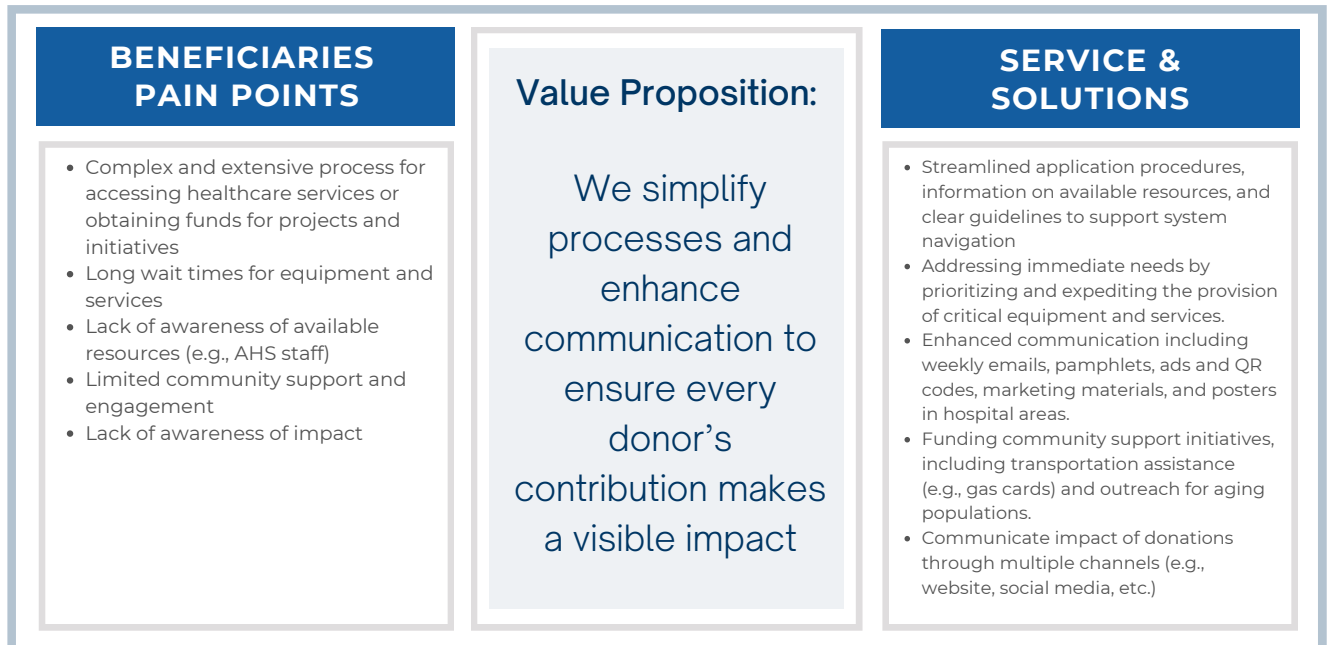
STAKEHOLDER SEGMENTATION

MAXIMIZING IMPACT: VALUE PROPOSITION & TAILORED MARKETING

VOLUNTEER PAIN POINTS

- Transportation, parking, and accessibility
- Volunteer insurance coverage
- Age restrictions or limitations
- Lack of mutual benefit, support, or recognition
- Lack of clear impact or inability to see tangible outcomes
- Limited sense of community or social isolation
- Limited opportunities for professional development

Value Proposition:

We provide opportunities for individuals to contribute meaningfully, enhance their resumes, and build lasting connections

SERVICE & SOLUTIONS

- Organized volunteer carpool for events
- Insurance coverage while volunteering with the CRHF
- Inclusive events to accommodate all ages
- Monthly volunteer spotlight to celebrate contributions and boost morale and engagement
- Meaningful initiatives to apply skills and directly see the impact on the healthcare system
- Supportive environment where volunteers can build connections, find mentorship, and feel included
- Valuable experience and resume-building opportunities

DONOR PAIN POINTS

- Lack of recognition or unclear process
- Lack of awareness of fund allocation or transparency in financial management
- Misunderstanding of funding sources (e.g., assumptions regarding government funding)
- Inadequate receipting process

Value Proposition:

We drive meaningful impact through our donors while ensuring they feel valued and informed about their contributions

SERVICE & SOLUTIONS

- Donor appreciation through monthly thank-a-thon (phone calls, donor recognition wall and pamphlets, social media posts)
- Website and social media promotion of purchased equipment and funded initiatives that clearly show the impact of donations and highlight the commitment to transparency
- Funding awareness campaigns that educate donors about funding gaps and the essential role of their contributions
- Administrative fee levy (10%) to cover administrative costs, clearly communicating the purpose and benefits associated and a clear process for receipts

"We can't DO anything without our DOnors"

STAKEHOLDER SEGMENTATION

MAXIMIZING IMPACT: VALUE PROPOSITION & TAILORED MARKETING

BENEFICIARIES PAIN POINTS

- Complex and extensive process for accessing healthcare services or obtaining funds for projects and initiatives
- Long wait times for equipment and services
- Lack of awareness of available resources (e.g., AHS staff)
- Limited community support and engagement
- Lack of awareness of impact

Value Proposition:

We simplify processes and enhance communication to ensure every donor's contribution makes a visible impact

SERVICE & SOLUTIONS

- Streamlined application procedures, information on available resources, and clear guidelines to support system navigation
- Addressing immediate needs by prioritizing and expediting the provision of critical equipment and services.
- Enhanced communication including weekly emails, pamphlets, ads and QR codes, marketing materials, and posters in hospital areas.
- Funding community support initiatives, including transportation assistance (e.g., gas cards) and outreach for aging populations.
- Communicate impact of donations through multiple channels (e.g., website, social media, etc.)

SUPPORT/PARTNER PAIN POINTS

- Isolation, Silos, and Limited Coordination with Other Regional Organizations
- Inefficient Resource Utilization
- Poor Communication and Engagement Leading to Missed Collaboration Opportunities

Value Proposition:

We create collaborative opportunities, provide strategic referrals & offer adaptable support to enhance regional healthcare through effective partnerships

SERVICE & SOLUTIONS

- Foster partnerships with other foundations, sharing best practices and working on joint initiatives to reduce isolation and improve coordination
- Facilitate reciprocal referrals and leverage funding to maximize the impact of collaborative projects and initiatives
- Actively work to share updates, events, and opportunities, ensuring all partners are well-informed and engaged in collaborative efforts, sharing tips/tricks

2024 - 2027 STRATEGIC WORK PLAN

Three-Year Priorities

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STRATEGIC THEMES: 2024-2027

THREE - YEAR STRATEGIC PLAN OVERVIEW

PROMOTION & ADVOCACY	STAKEHOLDER ENGAGEMENT	REVENUE DEVELOPMENT

PRIORITIES

• Community & Impact Engagement	• Donor Engagement & Stewardship • Strategic Partnerships	• Overall Fundraising Strategy & Resource Development

POTENTIAL BARRIERS

• Lack of community awareness & limited understanding of CRHF's mission • Limited staff or financial resources • Challenges in addressing the diverse needs and preferences of different community groups • Difficulty in maintaining consistent and meaningful interactions • Failure to promptly communicate organizational activities and impact • Lack of cohesive messaging across platforms	• Failure to recognize contributions in ways that resonate with donors or lack of personalized interactions • Difficulties collecting or sharing impact stories • Communication barriers • Misaligned goals due to differences in values or priorities • Resource constraints (i.e., difficulty filling dedicated positions, time and capacity to develop the initiatives, costs) • AHS barriers to information sharing or information gaps	• Changes in the economic climate that impact donor contributions • Over-reliance on certain donor groups & potential donor fatigue • Narrow range of fundraising methods or approaches • Increased competition for funds from other organizations or causes • Unbalanced workloads impacting effectiveness • Difficulty securing revenue sources beyond grants • Challenges with fundraising and donor management

STRATEGIC THEMES: 2024-2027

THREE - YEAR STRATEGIC PLAN OVERVIEW

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OPERATIONS

5

PERFORMANCE & CONTINUOUS IMPROVEMENT

PRIORITIES

- Communications & Culture
- HR & Operational Processes

- Continuous Evaluations & Improvement

POTENTIAL BARRIERS

- Lack of clear communication channels & varied communication styles
- Time & cost constraints
- Uncertainty about feedback methods and appropriate donor acknowledgment
- Difficulty in finding & establishing CRHF's unique voice
- Awareness of ongoing campaigns
- Determining effective methods for collecting and measuring feedback
- Time vs output
- Challenges managing or implementing organizational change
- Training & information gaps

- Lack of responsiveness & openness to obtaining feedback for improvement
- Inadequate resources and processes for evaluating and integrating improvements (e.g., time, budget, personnel, tools)
- Lack of clear or defined metrics or benchmarks
- Lack of buy-in from stakeholders
- Concerns with implementation
- Bias or misinterpretation of results and ability to maintain objectivity
- Short-term focus detracting from long-term improvement
- Lack of internal buy-in or execution & follow-through to reach collective goals

THEME 1

PROMOTION & ADVOCACY

PRIORITY 1: COMMUNITY & IMPACT ENGAGEMENT

OBJECTIVE: INCREASE THE OVERALL AWARENESS OF THE FOUNDATION'S WORK WITHIN THE COMMUNITY

DIRECTIVES/ACTIONS TO ACHIEVE:

- Define a marketing campaign utilizing diverse methods (e.g., social media, newsletters, mailouts, and events) to increase awareness of the organization's mission and activities
- Deliver educational content to donors and stakeholders about the positive impact of the Foundation's work on healthcare in Southern Alberta
  - Regularly publish and distribute monthly or quarterly newsletters highlighting how donations are utilized
  - Publish an annual impact report outlining the impact achieved
  - Collect and disseminate inspiring and positive stories about the Foundation's impact to engage and motivate the community

TARGETS	MEASURES OF SUCCESS
- Increase the reach and visibility of the campaigns - Improve engagement with campaign content - Increase the number of educational sessions conducted - Enhance the distribution of educational materials - Improve feedback and understanding from educational sessions - Increase the frequency and consistency of report publication - Improve engagement with published reports - Enhance transparency and clarity in reporting - Increase the frequency of positive stories shared - Enhance engagement with shared stories - Improve the impact of stories on audience perception	# of impressions and reach across all campaign channels (social media, newsletters, mailouts, and events) # of interactions (likes, shares, comments) and click-through rates on social media posts and newsletters # of educational webinars, workshops, or presentations held for donors and stakeholders # of educational materials (reports, brochures, online content) distributed to donors and stakeholders % of positive feedback and increased knowledge reported by participants in post-session surveys # of reports and educational materials published and distributed according to the planned schedule (monthly or quarterly) # of downloads, views, or email open rates for the reports % positive feedback on report clarity and usefulness from recipient surveys # of "feel good" stories published and shared across various platforms (website, social media, newsletters) # of interactions (likes, shares, comments) and overall engagement metrics for the stories % of positive feedback or ratings from donors and stakeholders regarding the perceived impact of the organization's work

THEME 2

STAKEHOLDER ENGAGEMENT

PRIORITY 1: DONOR ENGAGEMENT & STEWARDSHIP

OBJECTIVE: ATTRACT AND ENGAGE NEW DONORS

DIRECTIVES/ACTIONS TO ACHIEVE:

- Develop and implement targeted strategies to acquire, engage, and connect with young donors and individual supporters
- Boost visibility and engagement through targeted digital marketing campaigns and online platforms to appeal to younger demographics
- Develop and implement online recognition strategies to effectively recognize and engage donors, fostering increased retention (e.g., donor appreciation week/bonanza)
- Distribute QR-coded posters in hospitals and community areas to drive online engagement with gaming as well as donations
- Establish advisory committees with young adults and collaborate with high schools and post-secondary institutions to build connections and encourage early involvement
- Investigate and apply best practices for engaging online supporters, including strategies to steward the relationship, encouraging them to volunteer or donate

TARGETS	MEASURES OF SUCCESS
- Increase the number of new donors under 40 - Enhance donor engagement with younger demographics - Boost website traffic and social media visibility - Improve online engagement through targeted marketing campaigns - Increase engagement from younger demographic - Increase young donor acquisition - Increase online donor appreciation events - Increase the frequency of donor recognition communications - Improve donor satisfaction with recognition efforts - Increase donor retention and satisfaction through events - Increase distribution of and engagement with QR-coded materials/expand poster placement - Increase youth involvement through advisory committees - Implementation of effective engagement strategies based on best practices - Enhance donor satisfaction and organizational reputation - Increase the retention rate of new donors - Increase the frequency of new donor interactions with the organization	# of new donors under 40 acquired each quarter % increase in engagement metrics (e.g., open rates, click-through rates) from younger donors % increase in website visits and social media followers # of interactions (likes, comments, shares) on online platforms % increase in engagement (e.g., social media interactions, website visits) from the targeted age group # of new young donors acquired monthly or quarterly # of online events held for donor recognition and appreciation % of positive feedback from donors regarding the acknowledgment and appreciation they receive % increase in donor retention rates following online appreciation events and % satisfied # of thank-you letters, calls, or emails sent to donors per quarter # of QR-coded posters placed in hospitals and community areas and # of QR-code scans and online donations generated from the posters # of advisory committees established and # of new youth and student engagements resulting from these committees and partnerships # of new engagement strategies applied and the resulting increase in online supporter involvement (e.g., conversion to volunteers or donors) % increase in positive feedback ratings from attendees of online donor appreciation events % of new donors who make a second donation within a year - Average number of interactions (emails, calls, events) per new donor per year

THEME 2

STAKEHOLDER ENGAGEMENT

PRIORITY 2: STRATEGIC PARTNERSHIPS

OBJECTIVE: FORM & STRENGTHEN STRATEGIC PARTNERSHIPS WITH KEY STAKEHOLDERS

DIRECTIVES/ACTIONS TO ACHIEVE:

- Actively engage Indigenous groups to explore opportunities for their involvement as board members and volunteers
- Develop strategies to engage with and establish connections in small communities outside Lethbridge
- Continue collaborating with other hospital foundations to share ideas, brainstorm, and form partnerships for joint fundraising events
- Maintain and enhance relationships with current stakeholders, including donors, volunteers, and beneficiaries.
- Build and grow relationships with new and existing community partners to support organizational goals
- Develop initiatives and strategies to encourage legacy giving among senior community members

TARGETS	MEASURES OF SUCCESS
- Increase outreach to Indigenous groups - Recruit Indigenous board members and volunteers - Expand outreach to small communities - Increase engagement from small communities - Enhance collaboration with hospital foundations - Develop new fundraising partnerships - Maintain engagement with current stakeholders - Retain current stakeholders - Increase the number of community partnerships - Enhance collaboration with existing community partners - Increase the number of referrals for donations from partners - Increase the number of positive endorsements from industry partners - Increase awareness of legacy giving among seniors - Grow the number of legacy gifts from seniors	# of Indigenous groups contacted and engaged # of Indigenous individuals appointed as board members or volunteers # of small communities outside Lethbridge contacted # of new community partnerships or collaborations established with small communities # of collaborative meetings or brainstorming sessions held with other hospital foundations # of new fundraising events created in partnership with other hospital foundations - Frequency of communications and interactions with current stakeholders (donors, volunteers, benefactors) % of existing stakeholders who continue to engage and support the organization # of new community partners established throughout the year # of joint initiatives or projects with existing community partners # of referrals or new donor leads generated as a result of partnerships # of endorsements or positive reviews from industry partners # of educational sessions or materials distributed about legacy giving to senior groups # and value of legacy gifts received from senior donors

THEME 3

REVENUE DEVELOPMENT

PRIORITY 1: OVERALL FUNDRAISING STRATEGY & RESOURCE DEVELOPMENT

OBJECTIVE: EXPAND AND DIVERSIFY THE FOUNDATION'S REVENUE STREAMS

DIRECTIVES/ACTIONS TO ACHIEVE:

- Develop a comprehensive revenue plan to identify and pursue both existing and new revenue streams
- Develop and maintain relationships with strategic partners to identify, explore, and secure alternate revenue sources
- Implement and enhance digital fundraising strategies to increase online contributions
- Establish partnerships with businesses to leverage corporate support and funding
- Design and execute a capital campaign to raise significant funds for specific organizational goals
- Expand annual campaigns to increase their reach and effectiveness over time

TARGETS	MEASURES OF SUCCESS
- Complete and implement the revenue plan - Implement revenue strategies outlined in the plan - Increase number of strategic partnerships - Increase online fundraising contributions - Improve supporter engagement - Secure new corporate partnerships - Achieve capital campaign fundraising goals - Increase annual campaign reach - Increase revenue from scaled annual campaigns - Increase the average donation amount from new donors - Increase the diversity of donation sources - Increase the number of new donors attending organizational events - Increase the number of new events successfully organized and executed	# of new revenue streams identified and pursued within the first year % of strategies from the plan that are actively implemented # of new and maintained strategic partners established and the amount of revenue secured from these partnerships annually % increase in online donations compared to the previous year or total amount of funds raised through digital channels % increase in engagement metrics (e.g., response rates, interaction levels) from tailored engagement strategies # of new business partnerships formed and the total amount of corporate funding raised - Amount of funds raised through the capital campaign relative to the target amount set % growth in campaign reach (e.g., number of participants, geographic coverage) and effectiveness (e.g., total funds raised) year-over-year % increase in funds raised from annual campaigns after implementing scalability strategies - Average donation amount from new donors per campaign % of donations coming from various demographic groups # of new donors who attend events or fundraisers hosted by the organization # of new events conducted, including those for specific campaigns like the cardiac campaign

THEME 4

OPERATIONS

PRIORITY 1: COMMUNICATIONS & CULTURE

OBJECTIVE: ENSURE CLARITY, CONSISTENCY, AND POSITIVITY IN ALL INTERACTIONS

DIRECTIVES/ACTIONS TO ACHIEVE:

- Implement effective two-way communication between staff, the Board, and the public
- Develop a schedule for regular check-ins, staff meetings, and quarterly staff-led team events to enhance communication and team cohesion
- Establish and communicate clear guidelines and objectives for the Marketing Team
- Develop and articulate a consistent brand voice for the Foundation
- Continue fostering a positive culture at all external and donor events, including new events for the cardiac campaign

TARGETS	MEASURES OF SUCCESS
- Improve communication effectiveness - Increase the frequency of staff and Board communication updates - Increase staff and Board satisfaction with communication - Enhance public feedback mechanisms - Increase the frequency of scheduled team meetings and check-ins - Increase the clarity and distribution of marketing guidelines and objectives - Increase the consistency of brand voice across all communication channels - Maintain high satisfaction levels at events & enhance event culture - Increase the number of positive feedback comments, online reviews, and testimonials received from event attendees	% internal satisfaction on surveys related to communication effectiveness among staff, Board members, and the public # of communication updates or newsletters sent to staff and board members per quarter % of positive feedback received in communication satisfaction surveys from staff and Board members # of feedback submissions from the public and responses provided # of team meetings and check-ins held per quarter, and % of staff satisfaction in communication and team cohesion surveys % of marketing team members who report understanding their guidelines and objectives in internal surveys % of communication materials reviewed and approved for brand voice consistency OR Consistency in the Foundation's "voice" as measured by audits of communication materials (e.g., website, social media, newsletters) % positive feedback rating on event culture and atmosphere from attendee surveys at external and donor events # of positive feedback comments, online reviews, testimonials, or survey ratings for external and donor events

THEME 4

OPERATIONS

PRIORITY 2: HR & OPERATIONAL PROCESSES

OBJECTIVE: ENSURE CLARITY, TRANSPARENCY, AND FAIRNESS IN HR AND OPERATIONAL PROCESSES

DIRECTIVES/ACTIONS TO ACHIEVE:

- Develop and implement a detailed employee handbook that outlines policies, procedures, and expectations
- Define and communicate Key Performance Indicators (KPIs) for each role to ensure clear expectations and performance measurement
- Refine organizational structure to support current operations while anticipating future needs
- Create detailed instruction manuals for each position to facilitate effective knowledge transfer and role clarity
- Establish a buddy system pairing new employees with experienced staff to support onboarding and integration

TARGETS	MEASURES OF SUCCESS
- Increase the clarity of role expectations communicated to employees - Increase the number of performance reviews conducted on schedule - Establish KPIs for all positions - Finalize and implement the new organizational structure - Increase the efficiency of organizational restructuring efforts - Increase staff satisfaction with organizational structure - Increase the number of role-specific instruction manuals created - Increase the usage rate of instruction manuals by staff - Launch and evaluate the buddy system - Increase the satisfaction of new employees with the onboarding process	% of employees who report understanding of expectations, policies, KPIs, and job expectations through surveys % of performance reviews completed within the designated review period # of positions with documented Key Performance Indicators (KPIs) % implementation of the updated organizational structure within the planned timeframe, and % of positive feedback from staff on its effectiveness # of new roles or changes implemented to improve operational efficiency annually % of employees rating the organizational structure as effective in internal surveys # of positions with completed instruction manuals within the next year % of staff who report using instruction manuals regularly in internal surveys % of new hires paired with experienced staff within their first month % of new hires rating their onboarding experience positively in surveys

THEME 5

PERFORMANCE & CONTINUOUS IMPROVEMENT

PRIORITY 1: CONTINUOUS EVALUATION & IMPROVEMENT

OBJECTIVE: REGULARLY EVALUATE TO ENSURE ALIGNMENT WITH GOALS & STAKEHOLDER EXPECTATIONS

DIRECTIVES/ACTIONS TO ACHIEVE:

- Enhance staff awareness of each other's goals and activities through regular updates and transparent communication
- Implement and utilize tracking tools to monitor individual and team progress, ensuring alignment with organizational objectives
- Continuously assess and enhance the effectiveness of internal operational components to ensure optimal performance and efficiency (e.g., org chart, processes, position needs, etc).
- Provide cross-training to ensure staff adaptability and alignment with evolving goals, and conduct regular gap analyses to address staffing needs and support growth
- Conduct quarterly reviews of the strategic plan and share updates with the Board to ensure ongoing alignment
- Document key improvements and progress in relation to goals and stakeholder expectations, and use these insights to inform ongoing evaluations and adjustments

TARGETS	MEASURES OF SUCCESS
- Increase staff awareness of each other's goals and activities - Increase utilization of tracking tools for monitoring progress - Increase operational efficiency through continuous assessment and enhancement - Enhance staff adaptability through cross-training and address staffing gaps - Increase alignment with the strategic plan through timely quarterly reviews and Board updates - Increase the use of documented improvements to inform evaluations and adjustments	% of staff participating in regular update meetings and % of staff reporting improved awareness of colleagues' goals % of staff and teams using tracking tools regularly and % accuracy in progress reporting % of internal operational components reviewed annually and % of identified improvements implemented # of cross-training sessions held annually, % of staff participating, # of gap analyses conducted, and % of staffing gaps addressed % of quarterly reviews completed on schedule and % of Board members receiving timely updates # of key improvements documented and % of improvements used to inform evaluations and adjustments

SUPPLEMENTAL MATERIALS

A detailed breakdown of findings can be found in the following supplementary documents:
- Virtual Strategic Planning Link (VSPL) Data
- Building the Strategy Background Report
- Strategic Planning Worksheets from the In-person Planning Session

An in-depth work plan (i.e., Strategic Action Plan) is supplementary to this report.

Please note that all personal and identifying information has been removed from supplementary materials in order to protect the confidentiality of everyone involved. All information gathered throughout the strategic planning process will remain confidential, in accordance with standards and guidelines set out by the Canadian Counselling and Psychotherapy Association (CCPA) and the Canadian Evaluation Society (CES).

Strategic Plan has been Conducted & Facilitated by:

COLLABORATIVE STRATEGIES
C O N S U L T I N G   I N C.