

The Compassionate Friends

Strategic Plan 2014



***The
Compassionate
Friends***

Supporting Family After a Child Dies



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Overview

This Strategic Plan was developed with the input and direction with representatives of all stakeholder groups of The Compassionate Friends.

The Strategic Plan is a management tool. Its main purpose is to provide focus and to ensure that The Compassionate Friends as an organization is working toward the same goals, to assess and adjust the organization's direction in response to a changing environment. In short, strategic planning is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it, with a focus on the future. (Adapted from John M. Bryson, *Strategic Planning in Public and Nonprofit Organizations*)

The plan serves a roadmap for the actions of the organization and will be used as a guide in the development of detailed action plans by the ED and COO for board approval and funding.

This plan will be formally reviewed and updated annually.



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Mission

When a child dies, at any age, the family suffers intense pain and may feel hopeless and isolated. The Compassionate Friends provides highly personal comfort, hope, and support to every family experiencing the death of a son or a daughter, a brother or a sister, or a grandchild, and helps others better assist the grieving family (adopted 2-25-2012).

Vision Statement

The vision statement of The Compassionate Friends is that everyone who needs us will find us and everyone who finds us will be helped.

Guiding Principles

The Compassionate Friends was established based upon seven principles. The principles are reviewed and minor wording changes have been made from time to time, but they continue to stand the test of time.

1. TCF offers friendship, understanding, and hope to bereaved parents, siblings and grandparents.
2. TCF believes that bereaved parents, siblings, and grandparents can help each other toward a positive resolution of grief.
3. TCF reaches out across society's barriers to all bereaved parents, siblings, and grandparents.
4. TCF understands that every member has individual needs and rights.
5. TCF reaches out to the bereaved primarily through our community of local chapters and secondarily by website, social media, and conferences.
6. TCF Chapters belong to their members.
7. TCF is coordinated nationally in its support to its chapters, bereaved parents, siblings, and grandparents.



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Diversity

TCF is committed to embracing diversity at all levels of the organization. We will develop programs that enable us to become pro-active in our approach to serving parents, grandparents and siblings grieving the loss of children of any age regardless of the cause of death. TCF diversity programs will extend throughout all sectors of our society. We define individual diversity in broad terms to mean: age, sex, race, creed, culture, color, and sexual orientation. We further define diversity in group terms to mean geographic location, socioeconomic level and different causes of death.



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Strategic Initiatives

Chapter Services

Every TCF Chapter will be provided with these 5 tools necessary to successfully build, maintain and sustain their organization.

1. Training

Provide easily accessible and affordable high quality opportunities for Chapter management training through on-site regional events and online courses. Expand, continually update and improve every aspect of our RCLTP training to offer more in depth information in areas such as basic grief education, diversity, facilitating meetings, creating an advisory board, fundraising, public awareness and outreach and recruiting volunteers.

2. Resources

Provide creative resources to Chapter leadership. Be a clearinghouse for the most current information related to grief, effective handouts for group discussions, books, videos and articles on grief and the loss of a child, sibling or grandchild. Continually provide the most current materials to Chapter leadership teams.

3. Public Awareness and Outreach

Build a public awareness and outreach program on the national level that can be provided to and modeled at the local level. Use technology to enhance our efforts via webinars, our Online Support Community and website, and social media. Focus on each significant partnership created, news coverage or article published either at the national, regional or local level.

4. Fundraising

Create an annual fundraising drive and national event which will allow TCF Chapters the opportunity to raise significant funds for themselves and participate in a large scale event.



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5. Regional Coordinator Program

Continue and strengthen the RC program as a line of communication and support between our national office and local chapters. RC's will assist the national office and support local Chapters through training and by maintaining regular contact with each Chapter by telephone, email, and personal visits. RC's will also communicate regularly with the National Office staff and Executive staff.

6. National Conference

Host a National Conference each year that brings together leadership and members from all levels of the organization. The Conference will focus on offering hope and comfort for the bereaved and provide information and inspiration for our volunteers and leadership. While our National Conference should certainly be self-sustaining, it will be judged on its ability to offer hope to our members, inspire and further educate our leaders, and effectively shine a light on TCF as a national non-profit supporting families in grief.

7. TCF Chapter Growth

There are hundreds of communities that are currently not served by a TCF Chapter. We will continually strive to identify these areas and develop a strategy of outreach and public awareness within these communities to foster the creation of new chapters.



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FUNDRAISING/DEVELOPMENT

Goal: To ensure the financial stability of the organization by the diversification of our funding sources, including expanding our outreach to non-bereaved prospective donors. This will be accomplished in the following ways:

1. Annual Fund

A. Creation of an Annual Fund campaign.

1. To be renewed and re-named each year.
2. This campaign will support TCF's annual operating expenses.

B. Establish a Communications/PR plan to promote Annual Fund Campaign.

(See Outreach section.)

1. Also to be renewed each year.
2. Will incorporate all events as well as fundraising efforts.

2. Development Plan:

Create an annual Development Plan that will include all facets of TCF's fundraising and set goals based on the organization's approved annual budget. This will include:

1. Direct mail appeals: Continue with Holiday Appeal and spring appeal to include annual fund and event needs. Focus on expanding demographic to incorporate potential, non-bereaved donors.
2. Grant solicitations: Focus on research and grant proposals to potential funders.
3. Special events (see examples in #4 below)
4. Promote additional sponsorship opportunities: Brochures, National Office.
5. Target "non-ask" communications to nurture supporters throughout the year.

3. Grant writing and research:

1. Create a clearly defined and named program that communicates longevity and measurable outcomes that will be used for funding requests.
2. Establish ongoing possible sources of funding through research of foundations.
3. Communicate with foundations via Letter of Intent, online communication, personal phone calls.
4. If TCF mission fits the Foundation's giving guidelines, submit proposal.
5. When possible, maintain communication with Program Officer or Foundation representative.
6. Create annual grant writing calendar.



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4. Events:

Host annual event(s) that are primarily considered fundraising events.

Explore the possibilities of hosting the following:

1. **Gala** – Host a formal Gala each year to allow TCF to reach out to potential corporate and individuals who would support TCF’s mission although they’re not directly involved in the organization.
Location: Chicago or Oak Brook area.
2. **National Walk to Remember Day:** Make this a stand-alone event that is held either in the spring or fall in Chicago. This will not take the place of the Conference Walk to Remember.
3. Work with other similar organizations to partner on an event.

PUBLIC RELATIONS/OUTREACH/MARKETING

Goal: To share the story and history of TCF at the national and local levels to encourage greater interest, participation and financial support.

1. Create an annual public relations plan that includes the following:

1. Planned outreach via TCF website, social media, e-newsletters.
2. Planned outreach to local and national media.
3. Event-focused public relations for the Conference, National Walk to Remember and Worldwide Candle Lighting.
4. Establish a clear response plan and message to be used in the occurrence of an unexpected tragedy.
5. Provide media packets to Chapters.
6. Scheduled outreach to local and national media from the National Office re: personal stories and impact on the community.
7. Consistent messaging about the ways TCF is funded.

2. Update and enhance TCF’s media packet that can be used for a number of purposes, such as being sent to prospects such as possible corporate sponsors and individual donors.

1. Create a printed and an electronic version that is accessible on TCF’s website.



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3. **Produce multiple videos about TCF that includes educational webinars, event footage, training testimonials and history of the organization.**

4. **Use the Annual National Conference as a vehicle for outreach.**



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The Process:

Beginning in November of 2012, a committee consisting of the following:

7 Board members, The Executive Director, **2 Staff members and 1 RC**

Was convened to perform a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis

- Internal strengths;
- Internal weaknesses;
- Opportunities in the external environment;
- Threats in the external environment.

From the results of this SWOT analysis, a Survey Monkey was prepared to get the feedback of all stakeholders.

The summary results of this survey are attached to this Strategic plan as exhibit A.

The summary results aided the ED, COO and Strategic Plan Committee as they developed the strategic initiatives that will serve as a guide for all Action plans for The Compassionate Friends.

In 2014, a committee comprised of the following individuals continued developing the Strategic Plan, culminating in the document that is being presented to the Board of Directors for review in March, 2014:

Board Members

Glen Lord
Patrick O'Donnell
Georgia Cockerham
Chuck Collins
Barbara Allen
Joan Campbell

Staff

Alan Pedersen
Lisa Corrao



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Appendix A - Summary results of this survey

Survey Information

TCF sent out 1,174 surveys (these went to chapter leaders, co-leaders, newsletter editors, webmasters, national board members present and past, regional coordinators, and staff) and 3 messages encouraging response to the survey (this includes the message with the original survey). Of this number, 68 addresses were returned, with 1,106 remaining as possible responders (3 opted out).

Minus those whose e-mail addresses bounced, there were, according to Survey Monkey, 589 who responded and 517 who did not respond (this included the 3 opt-outs). We had 589 responses of 1106 who received the survey or 53.3% responded. This included 43 who started the survey but did not complete the survey. The 53.3% is an astonishingly high rate of response to any survey.

Question #1, the respondents were asked for some basic relationship information. Of the 590 persons who responded to the question, 564 respondents (95.6 %) indicated they are bereaved parents. The next largest group consists of 75 respondents (12.7%) who identified themselves as siblings. Obviously, a significant number of sibling respondents are also bereaved parents. Grandparents made up the third highest category with 25 respondents (4.2%), followed closely behind by aunts or uncles with 23 (3.8%) responses received.

Question #2, the participants were asked how long they have been bereaved. Of the 589 persons who responded to this question, 518 or (87.9%) are bereaved four years or longer. Of those in this category, 189 or 32.1% are bereaved 11-19 years. Only one response was submitted by someone bereaved less than a year and 41 (7%) participants are bereaved less than three years.

Question #3, survey participants were asked to identify their various roles in TCF. Chapter leaders make up the greatest number of respondents with 424 or (72.2 %). Chapter newsletter editors or webmasters represent 271 respondents (46.2%). Regional Coordinators were well represented with 54 responses, comprising 9.2% of the respondents. Another 122 persons identified their roles as chapter treasurers (20.8%).



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Question #4 reads as follows, *“As a leader in TCF, please think about people who come in contact with you through the organization and rate what you feel is important to them. These are intentionally broad areas, as this question is intended to examine the big picture and not the small details.”*

In an effort to interpret the data provided and to ensure each respondent’s answers are reflected in the tabulation process, some dimensions were grouped together to identify any consistent theme in the responses. Respondents who assigned a rating of “unimportant”, “little importance”, or “neither important or unimportant” were grouped together. Those who rated the categories as having “some importance” or “very important” were grouped together.

The results to Question 4 revealed that **Chapter Meetings** received the largest number of “important” ratings with 537 (96%), as compared with 5 people who assigned ratings within the “unimportant”, “little importance”, or “neither important or unimportant” range. The **Worldwide Candle Lighting** received the second largest number of “important” ratings with 532 (95%), as compared with 17 people who rated this event as “unimportant”, “little importance”, or “neither important or unimportant.” The **TCF National Website** received the third largest number of “important” ratings with 517 (92.6%), as compared with 28 people who rated it as “unimportant”, “little importance”, or “neither important or unimportant.” **TCF’s E-Newsletter** received the fourth largest number of “important” ratings with 488 (87.6%), as compared with 52 people who rated it as “unimportant”, “little importance”, or “neither important or unimportant.” **We Need Not Walk Alone Magazine** received the fifth largest number of “important” votes with 482 (86.5%), as compared with 59 people whose rating fell in the “unimportant”, “little importance”, or “neither important or unimportant” range.

Question #5 reads as follows: *Please think about TCF and its attributes that hold the most promise in helping the organization accomplish its mission/vision. Please rate the importance of each of the following. These are intentionally broad areas, as the purpose of the question is to examine the big picture and not the small details.*



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Again, in an effort to interpret the data provided and to ensure each respondent's answers are reflected in the tabulation process, some dimensions were grouped together to identify any consistent theme in the responses. Respondents who assigned a rating of "unimportant", "little importance", or "neither important or unimportant" were grouped together. Those who rated the categories as having "some importance" or "very important" were grouped together.

Further develop educational resources for chapters received the largest number of "important" ratings at 520 (93.6%), as compared with 22 people whose rating fell in the "unimportant", "little importance", or "neither important or unimportant" range. **Expand Social Media Outreach** received the second largest number of "important" ratings at 471 (84.8%), as compared with 59 people whose rated this category in the "unimportant", "little importance", or "neither important or unimportant" range. **Expand the number of TCF Chapters** received the third largest number of "important" ratings at 469 (84.5%), as compared with 61 people who rated this topic as "unimportant", "little importance", or "neither important or unimportant." **Increase the number of topics covered in TCF's brochures/website** received the fourth largest number of "important" ratings at 458 (82.5%), as compared with 80 people who rated this in the "unimportant", "little importance", or "neither important or unimportant" range. **Improve National Office Chapter Communications** received the fifth largest number of "important" ratings at 447 (80.5%), as compared with 71 respondents who rated this as "unimportant", "little importance", or "neither important or unimportant."

Question #6 reads as follows: *Please think of the national organization and its current attributes and rate each area listed as a possible detriment to TCF's ability to successfully accomplish its mission/vision.*

In an effort to interpret the data provided and to ensure each respondent's answers are reflected in the tabulation process, some dimensions were grouped together to identify any consistent theme in the responses. Respondents who assigned a rating of "somewhat detrimental, very detrimental, or extremely



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detrimental“ were grouped together. Those who rated the categories as “*not detrimental*” remains as a stand-alone category for comparison purposes. For reasons unknown, the vast majority of survey participants (565 or 95.7%) apparently skipped this question. Thus, due to the limited responses, any patterns noted should be given very limited weight.

The number of donors currently in our database received the largest number of “*somewhat detrimental, very detrimental, or extremely detrimental*” ratings at 17 (68%), as compared with 6 people whose rating fell in the “*not detrimental*” category. ***Present training opportunities for leadership*** received 16 (64%) ratings in the “*somewhat detrimental, very detrimental, or extremely detrimental*” range, as compared with 9 ratings in the “*not detrimental*” category. ***Communication of a clear direction*** also received 16 (64%) responses in the “*somewhat detrimental, very detrimental, or extremely detrimental*” range, as compared with 9 ratings in the “*not detrimental*” category. ***Present training opportunities for leadership*** received 16 (64%) responses in the “*somewhat detrimental, very detrimental, or extremely detrimental*” range, as compared with 9 ratings in the “*not detrimental*” category. ***Present Breath of TCF Offerings*** received 15 ratings (60%) in the “*Not detrimental*” category, as compared with 10 ratings in the “*somewhat detrimental, very detrimental, or extremely detrimental*” range. ***Communication of potential volunteer opportunities*** received 15 ratings (60%) in the “*somewhat detrimental, very detrimental, or extremely detrimental*” range, as compared with 8 ratings in the “*not detrimental*” range. ***Cost of events*** also received 15 ratings (60%) in the “*somewhat detrimental, very detrimental, or extremely detrimental*” range, as compared with 10 ratings in the “*not detrimental*” category.

Question #7 reads as follows: **What would you like TCF to look like in five years.** This category invited respondents to directly express their views over an unlimited number of potential topic areas. A total of 392 responses to this question were received with a wide range of comments with many containing multiple answers. To the extent possible, similar comments were grouped together to identify consistent patterns in attitudes with threshold of at least twenty comments to constitute a pattern. The overwhelming, most frequently expressed theme in the comments was a desire that TCF achieve **increased public outreach, publicity, public awareness and wider recognition** was mentioned in 96 (24.4%) of the comments). A desire for TCF to **increase the number of chapters** nationwide was



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expressed in 48 (12.2%) of the comments. In the third most frequently expressed comment, 32 (8.1%) respondents indicated they were satisfied with TCF in the **status quo**. The fourth most frequent comment, 30 (7.6%) reflected a desire for **more overall support and training at the chapter, regional or local level**, including support in providing topics and outlines for meetings.¹ A total of 29 (7.3%) respondents expressed the desire for **more TCF involvement in social media, technology, webinars, on-line training, and online chapter recordkeeping**. The sixth most common comment from 23 (5.8%) respondents expressed the hope TCF will continue reaching out to everyone in each region who is grieving the loss of a child, sibling or grandchild. It should be noted that a number of respondents expressed the hope TCF would play a greater role in the future in educating the public and professionals in their communities about grief and child-loss. In addition, a considerable number of respondents expressed the hope that professionals, hospitals, other emergency services and funeral homes would refer grieving families to TCF on a more systematic basis.

While the overall responses covered a very wide range of suggestions and concerns, the above comments represent those where some significant level of consensus was noted. Among the most progressive suggestions noted during this review were suggestions from two different respondents for 1) Creation of a virtual TCF Chapter and 2) The possibility of holding interactive TCF chapter meetings. While our online support community currently arguably serves as the functional equivalent of an interactive chapter meeting, the idea merits further discussion and consideration. It should be noted that this report is intended only as an *overview* of the responses and comments received by all who participated in this survey. I encourage all members of the board to review the actual survey results and to consider each idea and suggestion submitted by those who took the time to participate in this survey.

¹ It should be noted that an additional 13 responses were received suggesting that smaller chapters should be given more support from the National Office. Since the desire for this additional support was limited to smaller chapters, it was not included in this total, but should be considered along with it.