

**The National Multiple Sclerosis Society  
Utah State Chapter**

**Strategic Plan  
October 2008 - September 2011**



**National  
Multiple Sclerosis  
Society**  
Utah Chapter

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# Executive Summary

**The Utah State Chapter** initiated a long-term strategic planning process in January 2008 and worked with a planning team of 30 community stakeholders including the Board of Trustees, people with MS, clinicians, researchers, donors and executive staff members. This team worked for six months assessing the strengths and opportunities of the Chapter and identifying ways in which we could support the National Society's Strategic Response.

This process has helped us align the goals of our stakeholders and identify **four strategic priorities** of the Chapter. These are:

- Initiating a major community project to establish an MS Institute which will provide enhanced service to Utahans affected by multiple sclerosis.
- Implementation of targeted programs to address the needs of people affected by MS with focus on community partnerships, statewide service, direct services, education and wellness programs.
- Establishment of a marketing infrastructure which will empower people to act at every level and make a difference in the MS movement.
- Strategic growth in our income so that the Chapter is raising \$4 million annually by 2013 to support the mission of the Society (a 40% increase from where we are today).

The Chapter's organizational structure aligned well with the four strategic priorities of the planning team, providing direction to each of the three functional departments of the organization (Programs and Services, Marketing, and Development) as well as identifying a major initiative (the MS Institute) for the Board and its Executive team.

The product of our planning team follows, with a long term vision for the Chapter and detailed strategies to achieve this vision for FY2009 through FY2011.

# Overview: The National MS Society

The National Multiple Sclerosis Society was founded in New York in 1946 with the goal of raising public awareness of MS and to provide funding to research the cause, prevention, and cure for the disease.

Today, the National MS Society supports more MS research and provides more services, education, and advocacy for people with MS than any national voluntary MS organization in the world.

In May 2006, the Society embraced a new Strategic Response which confirmed these goals:

## Goals:

- We are a driving force of MS research, relentlessly pursuing prevention, treatment, and cure.
- We address the challenges of each person whose life is affected by MS.

## To Accomplish These Goals:

- We mobilize the talents and resources of the millions of people who want to do something about MS.
- We are activists.
- We will raise a total of \$1.25B by the end of 2010 to be used in the fight against MS.

The Society's commitment to research has been instrumental in the development of six FDA-approved medications that can reduce the number of acute MS attacks, protect the central nervous system from damage and delay the onset of more permanent disabilities. All six drugs, interferon beta-1a (Avonex®); interferon beta-1b (Betaseron®); glatiramer acetate (Copaxone®); interferon beta 1-a (Rebif®); mitoxantrone (Novantrone®) and natalizumab (Tysabri®) benefited from Society support of pilot research, beginning as early as the 1970s.

The organization today has a 50-state network of chapters expending nearly \$126 million a year to serve over one million people and which devotes more than \$46 million each year to support over 440 research projects internationally. The Society's web site receives nearly two million visitors each month (*[nationalMSSociety.org](http://nationalMSSociety.org)*); provides a toll-free telephone number that connects callers to their nearest local office (1.800.344.4867); and publishes an award-winning quarterly magazine Momentum, which has a readership of over one million. The Society also offers educational programs to health-care professionals and organizes state and national advocacy campaigns to address issues impacting people with disabilities.

**MS stops people from moving. We exist to make sure it doesn't.**

# The Utah State Chapter

The Utah State Chapter was incorporated on December 6, 1954 as the local extension of the National Multiple Sclerosis Society. The Chapter, located in Salt Lake City, provides a wide variety of programs, fundraisers, activities, and services statewide for Utahans with MS, their families, and friends.

**Our objective: to empower people with MS to lead productive and fulfilling lives.**

Scientists and researchers don't know what causes this mysterious disease; however, it is more frequent in areas farther from the equator and also among Caucasians from Northern Europe. Utah is both north of the equator and populated by many with Northern European heritage. This combination of environmental and genetic factors is believed to be a possible explanation of why Utah has one of the highest rates of MS in the nation.

## What we do

In 2007 we served 4,500 registered clients and 25,000 others – family, friends, co-workers, and care partners – who share the impact of living with MS. Thanks to the passionate support of our donors, our members benefited with a 20% increase in our direct services to clients in 2007. This included services like financial assistance, care management, physical health and wellness, and many others. What's more, the Chapter was able to provide 3,500 service hours educating clients.

Additionally, the Chapter invested more than \$430,000 in research to find cures to treat, prevent and end multiple sclerosis. We were also able to make a commitment to the Society's Promise 2010 Research Campaign. The Utah Chapter is very proud of the research talent we have in our state which has resulted in over \$1.5 million of National MS Society grants currently being awarded to Utah researchers.

All of the services and support the Chapter provides would not be possible without the tireless commitment of our donors, fundraisers, and volunteers who make it happen. The Chapter realized over 10% growth in gross fundraising revenue. We are pleased to have been recognized by the National Society as part of the "Million Dollar Club" for our Bike MS event which raised over \$1.5 million. Our Walk MS also broke fundraising records and we continue to benefit from partnerships with many community sponsors, foundations, and the more than 1,000 volunteers supporting the Chapter.

# The National MS Society Mission

**to create a world free of MS**

**In Utah, we seek to create a world free of MS while improving the life of each person affected by the disease.**

# Our Vision

## Nationally:

We are a driving force of MS research, relentlessly pursuing prevention, treatment and a cure

We address the challenges of each person whose life is affected by MS

We are activists

We mobilize the talents and resources of the millions of people who want to do something about MS

We will raise a total of \$1.25 billion by the end of 2010

## In Utah:

We will establish research, clinical, and community partnerships to relentlessly pursue prevention, treatment, and a cure

We will build and support programs and services to empower each person affected by MS

We will actively establish awareness and advocate for the MS cause and brand

We will mobilize the talents and resources of Utahans to Join the Movement

We will be a \$4 million chapter by 2013

## To support our vision, this strategic plan provides for the following:

We will establish research, clinical, and community partnerships to relentlessly pursue prevention, treatment, and a cure

- The Chapter will support the creation of an MS Institute to provide enhanced capacity to serve people with MS and provide collaborative support through social work, education, and public awareness.
- The Chapter will continue to enhance its partnership with The Brain Institute to promote interdisciplinary research for MS; we will support the Institute in their application for an MS Center Grant; and we will identify new ways to promote MS research in Utah.
- The Chapter will build relationships with neurologists and allied health professionals throughout the state to identify ways to partner and provide higher quality and quantity of service to people with MS.

We will build and support programs and services to empower each person affected by MS

- To ensure people with MS can live their best life, the Chapter will provide and promote effective education, support, resources and continuity of care. The programs and services of the Chapter will focus on establishing community partnerships, providing targeted statewide service, increasing direct services to people with MS, maintaining the Society's strength in community education, and increasing participation in wellness programs.
- We will identify community partnerships and resources which will increase access to high quality, comprehensive care for people with MS and their families (particularly through health care & insurance company partnerships).

We will actively establish awareness and advocate for the MS cause and brand

- We will develop effective communications tools to establish brand awareness and to engage individuals to join the movement for the Society and in their communities. By empowering people to act and make a difference we will actively establish awareness of the Society mission.
- We will establish partnerships with individuals and organizations that share our goals and advocate for the needs of people with MS.
- We will be a voice within the community (institutional, health care, and at large) to promote support for an MS Institute.

We will mobilize the talents and resources of Utahans to Join the Movement

- We will establish partnerships in all functional areas of the Chapter to engage the community at large in the MS movement.
- We will see an increase in the use of our services, participation in our events, volunteers, and media exposure.
- We will mobilize MS Ambassadors as volunteers in our community to advocate for our cause.
- We will build a faith-based grassroots network of Society supporters.

We will be a \$4 million Chapter by 2013

- The Chapter's income capacity will grow by 7.5% on average over the next five years to support growth in the mission of the Society.

# Our Values

The Utah State Chapter has affirmed our support to the values of the National MS Society which include **commitment, leadership, integrity, excellence** and **teamwork**. We further define the values of the Utah State Chapter and all stakeholders (staff, volunteers, clients and supporters) as:

## 1 Commitment

We are passionate, dedicated and fully engaged to resolve issues and make decisions central to our mission and vision.

## 2 Leadership

We inspire our community to:

- Increase MS awareness.
- Advocate for public support and engagement.
- Promote the best standard of care.

## 3 Respect

We treat everyone with dignity and compassion. We value and consider diverse input.

## 4 Excellence

We set high expectations and hold ourselves accountable for ethical behavior and measurable results.

## 5 Teamwork

We recognize individuals and teams as we work collaboratively to achieve common goals.

# Our Business

## Products and Services

### Research

In FY08 we forecast investing more than \$430,000 in research dollars through the remittance paid to the National office and administered through the National Peer Review Committee. Additionally, we work to establish supportive (non-monetary) relationships with Society funded researchers in Utah. Currently, the Society is funding six projects in Utah with over \$1.5 million, including:

1. Eun-Kee Jeong, Ph.D.: \$44,000  
“High-resolution diffusion tensor MRI of MS spinal cord” Evaluating a method of determining damage to the spinal cord in people with MS.
2. John Kriesel, M.D.: \$242,990  
“Viral triggers of multiple sclerosis exacerbations: an expanded clinical trial” Detecting specific viruses involved in colds that are linked to relapses in people with MS.
3. John Rose, M.D.: \$614,900  
“The role of cyclooxygenase in multiple sclerosis” Understanding how the immune attack in MS might also harm myelin-making cells and exploring ways to overcome this inhibition to repair.
4. John Rose, M.D.: \$563,475  
“The role of COX-2 in oligodendrocyte death and demyelination” Understanding the potential role of an inflammatory protein called COX-2 in the destruction of myelin making cells in MS.
5. Ikuo Tsunoda, M.D., Ph.D.: \$44,000  
“Treatment of animal models for MS with resveratrol, a natural compound in red wine” Investigating whether a chemical found in red wine can reduce damage to nerve fibers in animals with MS-like disease.
6. Andrea White, Ph.D.: \$44,000  
“A sensory model of MS fatigue: Alterations in neuronal signaling systems” Exploring the biological basis of fatigue in people with MS.

### Programs

In FY08 the Chapter served 4,500 people with MS and 30,000 Utahans affected by the disease. The services provided included:

Legal consultation	Advocacy at the local, state and national levels
Physical therapy	“Society in the City” statewide appointments with clients
Financial assistance	MS 101 education
Scholarships for post-secondary education	Care management
Self-help groups	Professional education for physicians
Family Day at the Bees	Professional education for mental health professionals
Holiday Party	Care giver conference
Women’s Conference	Living Well with MS education
Research Symposium	Advocacy teleconferences
Employment Symposium	Monthly financial planning classes
Men’s Night Out	Long term care seminar
Teen-specific social events	One-on-one peer support
Young-adult specific programming	Free educational materials and brochures
Couples workshops	Social Security Disability Insurance training
Lending library	MS Connection newsletter
Information and referral over the phone	
Teleconference educational series	

### Funding

The Chapter has grown an average of 8.25% annually over the last 3 years, from \$2,435,108 in 2006 to a forecast of \$2,854,645 by the end of FY08. This increase is attributed primarily to the growth of our events, and primarily Bike MS. The focus in this strategic plan is to continue to plan for growth in our events, but to diversify our sources of revenue and invest in the cultivation of other traditional categories of giving including grants, individual giving, Chapter-wide corporate partners, etc.

## Customers

To be successful, the Chapter must provide value to the following customers:

- People with MS
- People affected by MS – families, care givers, friends and associates
- Health care professionals
- Supporters (donors, sponsors, partners, volunteers)
- Researchers

## Partners

To be successful, the Chapter must establish relationships with the following partners:

University of Utah – administration and Department of Neurology	MS Friends (peer support network)
Select Health (IHC) administration	Recreational organizations: Splore, National Ability Center, Common Ground
The Brain Institute at the University of Utah	All Utah media
Funding partners – donors, private business, government, etc.	Dozens of local corporations
National MS Society national office	Individuals with influence in the community
Neurologist offices	Donors
Allied health professionals	Cycling community
Insurance companies	Pharmaceutical companies
Physical activity centers: physical therapy, pools, yoga centers	Chapter vendors



# Our Strategic Priorities

Through the Strategic Planning process, the Chapter's Planning Team identified four areas of focus for the Chapter in the years ahead. These focus areas are:

## 1 Major Community Initiative

Establishment of an MS Clinical and Research Institute to provide enhanced capability and capacity at the University of Utah (and beyond) to clinically serve people with MS and provide collaborative support through the Chapter to provide social work, education, and public awareness.

## 2 Targeted Programs

Initiatives to maximize the programs and services provided by the Chapter to address the needs of people affected by MS with the result of providing targeted resources to allow those affected by MS to live their best lives.

## 3 Marketing Infrastructure

Development of a Join the Movement marketing campaign to instigate action and empower people to act to make a difference in the MS movement.

## 4 Income Generation

Strategic growth in the Chapter's income to become a \$4 million Chapter by 2013 in order to provide more support to the mission of the Society.

# 1 Major Community Initiative: MS Institute

**Objective #1: Obtain commitment from the University of Utah for an MS Institute.**

**WHY?** To assess the readiness of the University of Utah to embrace an MS Institute.

	<u>Specific actions</u>	<u>Responsibility</u>
<b>FY09</b>	<ol style="list-style-type: none"> <li>1. Identify support from the University Administration and the Department of Neurosciences.</li> <li>2. Identify opportunity and action required to garner support in the University's Capital Campaign.</li> <li>3. Identify personnel resource support (i.e. recruitment of additional faculty, support of NMSS-funded nurse or fellow, etc)</li> </ol>	<p>Chap President &amp; Board Cmte</p> <p>Chap President &amp; Board Cmte</p> <p>Chap President &amp; Board Cmte</p>
<b>FY10</b>	<ol style="list-style-type: none"> <li>1. Identify location and/or space possibilities.</li> </ol>	Chap President & Board Cmte

**Objective #2: Collaborate with Select Health (IHC).**

**WHY?** To invite all primary care providers and insurance companies in Utah to benefit from the services of an MS Institute.

	<u>Specific actions</u>	<u>Responsibility</u>
<b>FY09</b>	<ol style="list-style-type: none"> <li>1. Identify primary people of influence within IHC and potential connections to Chapter representatives</li> </ol>	Chap President & Board Cmte
<b>FY10</b>	<ol style="list-style-type: none"> <li>1. Meet with IHC executives to identify their role and gain their support (this should be done after support is confirmed and project scope is identified by the University of Utah)</li> </ol>	Chap President & Board Cmte

# 1 Major Community Initiative: MS Institute

**Objective #3: Engage The Brain Institute to instigate collaborative MS research in Utah and to receive an Society MS Center Grant.**

**WHY?** To cultivate and promote the research talent in Utah and to capitalize on the opportunity to conduct trials, providing people with MS opportunities to enhanced care.

	<b>Specific actions</b>	<b>Responsibility</b>
<b>FY09- FY11</b>	<ol style="list-style-type: none"> <li>Engage Chapter in Executive Committee of the MS Research Interest Group</li> <li>Support application of MS Center Grant to the Society</li> </ol>	<p>Chapter President</p> <p>Brain Institute</p>

**Objective #4: Cultivate other community partnerships to advance the objective of the Institute (i.e. other institutions, other neurologists, service providers, researchers, private business, government, etc)**

**WHY?** To enlist support of the entire community to endorse and support an MS Institute to provide enhanced service to people with MS.

	<b>Specific actions</b>	<b>Responsibility</b>
<b>FY09</b>	<ol style="list-style-type: none"> <li>Establish a Phase I center for education and support at the University in partnership with other disease groups to provide limited education and care management services.</li> <li>Identify list of partners who are necessary to advance the vision of the MS Institute.</li> </ol>	<p>Chap President &amp; Director of Programs</p> <p>Chap President &amp; Board Cmte</p>
<b>FY10- FY11</b>	<ol style="list-style-type: none"> <li>Cultivate partners as allies to the cause, and engage them in the process of development.</li> </ol>	<p>Chap President &amp; Board Cmte</p>

# 1 Major Community Initiative: MS Institute

**Objective #5: Identify potential donors and collaborate with MS Institute partners to cultivate donors.**

**WHY?** To secure the means to the end (i.e. to provide funding to ensure the creation of the MS Institute).

	<b>Specific actions</b>	<b>Responsibility</b>
<b>FY09</b>	<ol style="list-style-type: none"> <li>Identify people in the community who have an interest in MS and capacity to give.</li> </ol>	<p>CP, Dev.Dir. &amp; Board Cmte</p>
<b>FY10- FY11</b>	<ol style="list-style-type: none"> <li>Identify project(s) for potential funding.</li> <li>Cultivate potential donors for support of the Institute or projects within the Institute.</li> </ol>	<p>CP, Dev.Dir. &amp; Board Cmte</p> <p>CP, Dev.Dir. &amp; Board Cmte</p>

## Measuring Our Progress

<b>Measure</b>	<b>Current Score (FY08)</b>	<b>Desired Score (FY2011)</b>
MS Institute will be a reality	N/A	Plans will be confirmed for the integration of an MS Institute on the University Campus within the next 5 years
MS Education Center will exist as a precursor to the MS Institute	N/A	Facility will be operating in conjunction with the University clinical center providing patients with education, care management, and Society resources
MS Center grant	N/A	The Brain Institute will have received an MS Center Grant and be actively recruiting and promoting MS research in Utah.

## 2 Targeted Programs

**Objective #1: Increase and strengthen relationships with neurologists, allied health professionals, insurance companies and community resources.**

**WHY?** We want to be a first line referral (to help more people living with MS), offer professional education for the benefit of our clients and also offer support and services to health care professionals. We want to create and enhance existing two-way referrals among those listed. We want the Chapter and its community partners to identify and offer education and services to more people affected by MS.

	<u>Specific actions</u>	<u>Responsibility</u>
<b>FY09</b>	<ol style="list-style-type: none"> <li>1. Identify and create two-way communication with neurologists statewide.</li> <li>2. Conduct needs assessment for neurologists and their office staff.</li> <li>3. Continue Professional Education Conferences to include: Regional Summit, U of U CME Conferences.</li> <li>4. Allied Health: Research Professional Conferences (family practice, mental health, mid-levels, PT/OT, primary care, nurses)</li> <li>5. Identify key contacts within local insurance companies and develop relationships with the medical management/pharmacy divisions. Explore the possibility of creating a referral source to the society from the insurance company to support and advocate on behalf of persons living with MS.</li> </ol>	<p>Programs Director</p> <p>Programs Manager</p> <p>Programs Director &amp; Manager</p> <p>Programs Director &amp; Manager</p> <p>Advocacy Coordinator</p>
<b>FY10-FY11</b>	<ol style="list-style-type: none"> <li>1. Make quarterly contact with interested neurologists.</li> <li>2. Attend and present at conferences.</li> <li>3. Continue to cultivate professional, institutional and organizational relationships identified in FY 09.</li> </ol>	<p>All programs staff</p> <p>Programs Director</p> <p>All programs staff</p>

## 2 Targeted Programs

**Objective #2: Have a Chapter presence statewide. Presence is defined through education programs, awareness and participation in teleconferences and national programs, community resource development and in building relationships, support groups and direct services.**

**WHY?** We want to serve more people affected by MS. We strive to have more accurate numbers of people living with MS in Utah, to serve the entire state and to enhance the reputation of the National MS Society.

	<u>Specific actions</u>	<u>Responsibility</u>
<b>FY09-FY11</b>	<ol style="list-style-type: none"> <li>1. Build and strengthen relationships with health care and with appropriate community organizations (See Goal #1)</li> <li>2. Have literature on local and national programs in health care offices and in appropriate community organizations</li> <li>3. Partner with Marketing Department in order to heighten awareness about MS and increase membership</li> <li>4. Create partnerships with wellness organizations especially in outlying areas (See Goal #5)</li> <li>5. Hold town meetings every other year</li> </ol>	<p>Advocacy Coordinator</p> <p>Advocacy Coordinator</p> <p>Programs Director</p> <p>Programs Manager</p> <p>Chap President &amp; Prog Dir.</p>

**Objective #3: Provide valuable direct services to those affected by MS through care management, financial assistance, scholarships and other potential direct services.**

**WHY?** To offer responsive service and support to those affected by the disease (person with MS, spouse, children, friends and associates) today! We will enhance the quality of life of those affected by MS as a result of helping those with MS remain as independent as possible.

	<u>Specific actions</u>	<u>Responsibility</u>
<b>FY09-FY11</b>	<ol style="list-style-type: none"> <li>1. Increase referral network by developing awareness and marketing direct services to physicians, community partners, allied health professionals and local agencies</li> <li>2. Identify &amp; develop external resources available in the community.</li> <li>3. Develop strategies in all outlying areas to stimulate client participation.</li> </ol>	<p>Direct Services Manager</p> <p>Direct Services Manager</p> <p>Direct Services Manager</p>

## 2 Targeted Programs

**Objective #4: Provide education about MS along the continuum of the disease at the current level of service in a more cost effective manner.**

**WHY?** People will approach the Society at different stages of the disease. We need to serve the newly diagnosed, the progressed and those in between. Each stage has different needs.

	<u>Specific actions</u>	<u>Responsibility</u>
<b>FY09</b>	1. Partner with Marketing and Communications Department to develop MS Ambassador program to contribute to education offered at no cost.	Programs & Marketing Depts
<b>FY09-FY11</b>	1. Condense multiple in-person programs to day long programs with multiple topics in market areas 1-3 (Spend less per person and save on postage and print)	Programs Manager
	2. Maximize use of National programs and resources (Knowledge is Power, Learn Online, Relationship Matters, Keep Myelin).	Programs Manager
	3. Continue successfully attended educational programs such as: Women's Conference, Research Symposium and Couples Program. Re-evaluate each year.	Programs Manager
	4. Provide education to cover the continuum of the disease.	Programs Manager

## 2 Targeted Programs

**Objective #5: Increase availability of and participation in wellness programs (emotional 10% each year, physical 100% and social by 300%)**

**WHY?** To promote better health, assist in daily life with MS and offer support.

	<u>Specific actions</u>	<u>Responsibility</u>
<b>FY09</b>	<b>Physical:</b> 1. Research appropriate studios/centers for collaboration and build partnerships	Programs Manager
<b>FY09-FY11</b>	1. Offer training to wellness instructors to include: Aquatics, Yoga, PT/OT about MS	Programs Manager
	2. Educate clients on benefits of physical activity through an incentive driven wellness campaign	Programs Manager
	3. Develop and market partnerships with wellness centers and recreation organizations to make services available to clients	Programs Manager
	<b>Emotional:</b> 1. Research and partner with MS Friends for a solid Peer Support program and recruit local Peer Volunteers	Programs Manager
	2. Implement specialized Self Help Groups that might include: teens, newly diagnosed and other networking according to the expressed needs of clients	Programs Manager
	<b>Social:</b> 1. Increase low cost programs statewide	Programs Manager

## 2 Targeted Programs

Measure	Current Score (FY08)	Desired Score (FY2011)
Relationships (two-way referrals, distribute our literature, quarterly contact at minimum) with neurologists and/or office staff statewide.	10	Contact via intro letter and survey in FY09 to all Neurologists statewide. Have a relationship with 50% of neurology offices in 2010 and 80% by 2011.
Neurologist & mid-level participation at MS CME programs	10	Increase participation by 100% each year.
Society involvement at Allied Health Professional Education programs	2	Participate in two conferences (mental health, PT, OT, Mid-level, Nurses, or Primary Care) in 2010 and four in 2011.
Relationships with major insurance companies	0	Identify key contacts in 2009 and have a relationship with at least 3 companies by 2011
Increase number of registered clients	4500	Increase by 10% each year
Increase prevalence rate in Utah County	67%	80% by 2011
Increase participation in national programs, specifically in wellness and educational programs	See goals 4 & 5	See goals 4 & 5 for measurements.
Number of people served	Care Management: 20, Scholarship: 11, FAP: 50.	Increase numbers served by 20% each year. Care Management: FY09: 24, FY10: 29, FY11: 34 Scholarship: FY09: 13, FY10: 16, FY11: 18 FAP: FY09: 55, FY10: 66, FY11: 80
Increase number of community resources.	500	Increase resources by 10 each year (understanding that some resources terminate)

## 2 Targeted Programs

Measure	Current Score (FY08)	Desired Score (FY2011)
Decrease number of educational programs	50	Hold quarterly education programs to include continuum of disease content in 2009. Re-evaluate for FY10 planning.
Increase participation in National Programs	KIP participants FY 2007: 81 Relationship Matters participants FY 2007: 40 Keep Smyelin FY 2007: 143	Increase by 5% each year
Partner with Marketing Dept to effectively use MS Ambassadors	See Marketing WIG	See Marketing WIG
Community Partnerships (including training on MS) per market area in: PT, Aquatics, Yoga	Area 1: 3, Area 2: 0, Area 3: 1, Area 4: 0 and Area 5: 0.	Increase 30% per year. 2011: 3 wellness programs in areas 2 & 3, 2 wellness programs in areas 4 & 5 and 6 in area 1.
Participation in wellness programs	110	Increase participation in wellness programs by 100% to 220.
Peer Support Volunteers	0	4 per year for a total of 12 by 2011.
Number of healthy Support Groups (regular chapter contact, attending trainings, completing reports) per market area	Area 1: 4, Area 2: 2, Area 3: 1, Area 4: 1, Area 5: 2	Increase number of groups by 10% each year.
Annual Social Programs	2 in area 1	6 (2 in SLC, 1 per market area in 2-5) by 2011.

### 3 Marketing Infrastructure

**Objective #1: Establish higher quality media relationships and at the same time feed media more appealing stories and messages.**

**WHY?** The Chapter’s programs and events continue thanks to great support from participants, yet we must move beyond giving media the same press releases and stories each year. We need to build strong media relationships from the ground up and begin to feed region-specific stories, more personal stories and more timely stories that mesh with the broader news landscape.

	Specific actions	Responsibility
FY09	<ol style="list-style-type: none"> <li>1. Take stock in our current media relationships, develop stronger ties to all major Utah media, develop strategy for future media relationships</li> <li>2. Craft a “dream contract” for media partners that identifies negotiation points not to be missed.</li> <li>3. Collect a “story bank” at the chapter of personal stories.</li> <li>4. Take stock in associated communications partnerships (printers, Chamber of Commerce, etc.), strengthen ties</li> </ol>	<p>Dir. Marketing, Mktg Cmte</p> <p>Dir. Marketing, Mktg Cmte</p> <p>All staff</p> <p>Dir. Marketing, Mktg Cmte</p>
FY10-FY11	<ol style="list-style-type: none"> <li>1. Cultivate new major media sponsors and other significant media placements</li> <li>2. Establish ongoing partnerships with associated communications partners that pass the Society in-kind or sponsorship value</li> </ol>	<p>Dir. Marketing, Mktg Cmte</p> <p>Dir. Marketing, Mktg Cmte</p>

**Objective #2: Develop comprehensive annual marketing plans for development and programs departments.**

**WHY?** We need to more deliberately and carefully plan our marketing activities in each department rather than rely on past practices.

	Specific actions	Responsibility
FY09	<ol style="list-style-type: none"> <li>1. Understand Development and Programs strategic plans</li> </ol>	Dir. Marketing, Mktg Cmte
FY09-FY11	<ol style="list-style-type: none"> <li>2. Consult with each department re: message creation and delivery</li> <li>3. Craft increasingly targeted and detailed marketing plans annually</li> </ol>	<p>Executive Team</p> <p>Executive Team</p>

### 3 Marketing Infrastructure

**Objective #3: Increase our capacity to message to our community by tapping into existing grassroots networks.**

**WHY?** Because so many Utahans are affected by MS, there is great potential to better reach people within existing community networks. As we analyzed Utah’s existing assets, faith-based networks emerged as the most promising avenue for exploration. We plan to provide short and direct marketing messages to these communities, focusing on how they can *Join the Movement*.

	Specific actions	Responsibility
FY09	<ol style="list-style-type: none"> <li>1. Compile information on churches and clubs, strategize specific steps for each group, set up internal infrastructure for message delivery</li> </ol>	Marketing Department
FY10-FY11	<ol style="list-style-type: none"> <li>1. Use the MS Ambassador program to deliver messages to groups, link other internal players to external networks as appropriate (e.g., Bike MS Manager to church group bike team, etc.)</li> <li>2. Troubleshoot and manage relationships, start to see people within groups become “point people” for message delivery</li> </ol>	<p>MS Ambassadors, Marketing Dept, other Departments as appropriate</p> <p>Marketing Department</p>

**Objective #4: Build a much stronger web and e-mail presence to message more effectively.**

**WHY?** The internet is the first place clients and other constituents look for information about MS and about the Society. We also need to invest in e-communications to better reach out to a younger and more technologically savvy constituency.

	Specific actions	Responsibility
FY09	<ol style="list-style-type: none"> <li>1. Action #1: Overhaul chapter web site</li> <li>2. Set policies for chapter e-communications</li> <li>3. Establish MySpace site for Utah teens affected by MS</li> <li>4. Produce and use two YouTube videos with message driven by Development &amp; Programs strategic plans</li> </ol>	<p>All Staff</p> <p>All senders of e-comm.</p> <p>Marketing Department</p> <p>Marketing Department</p>
FY10-FY11	<ol style="list-style-type: none"> <li>1. Build relevance of web site to people in Utah with MS</li> <li>2. Use cyber presence to message in two ways:               <ol style="list-style-type: none"> <li>a. Appropriate content to a younger audience</li> <li>b. Time-sensitive items to all audiences</li> </ol> </li> </ol>	<p>Marketing Department</p> <p>Marketing Department</p>

## 3 Marketing Infrastructure

### Measuring Our Progress

Measure	Current Score (FY08)	Desired Score (FY2011)
Media relationships	4	6 significant, 12 secondary
Placed stories in media	6	12
Stories collected by chapter	0	100
Churches we collaborate with	0	25
Average monthly visits to Utah Chapter home page	100	200
Avg monthly posts on MySpace	0	15
Avg # e-mail forwards for viral e-mails	0	20

## 4 Income Generation

### Objective #1: Establish an infrastructure for traditional/non-event giving.

**WHY?** To capitalize on donors who give through non-event means and to diversify the Chapter's income stream to minimize our reliance solely on mass market events.

	Specific actions	Responsibility
FY09	1. Provide stewardship over each gift – establish a systematic process to timely process and acknowledge each gift received by the Chapter. <b>*Identify protocols by Oct. 1, 2008; implement effectively through FY 09</b> a. Thank You – establish and implement letter, call, and/or visit protocol to acknowledge gifts b. Develop exploratory script for mid-level donations with protocol for senior staff and/or volunteers to utilize in acknowledging mid-to-high level gifts (amount to be defined). c. Develop database of what we learn for long-term tracking (Chapter will need to define how data fits within the NMSS data systems for stability and longevity of donor cultivation)	Development Director
	2. Identify and cultivate opportunities for Foundation gifts. <b>* Complete by April 1, 2009</b> a. Establish Master Plan for Foundation Giving within first 6-months of year 1; revisit and update annually b. Research “Foundation Center” to identify grant opportunities. c. Identify foundations and corporations who fund in Utah.	Development Director & Programs Manager
	3. Identify Major Gift prospects and establish Chapter protocol for cultivation and communication <b>*Identify protocols by Oct. 1, 2008; implement effectively through FY 09</b>	Chapter President, Dev Director & Executive Coordinator
FY10-FY11	1. Cultivate major donors with dedicated staff support and comprehensive cultivation planning. 2. Workplace Giving – maintain at current level 3. Identify strategy and messaging for solicitation of donations from people with MS	Chapter President & Major Gifts Officer (new hire) Development Director Development Director
FY11	1. Identify Planned Giving/Bequest opportunities	Executive Team

## 4 Income Generation

**Objective #2:** Establish a comprehensive corporate partners program by the second year of the plan to increase the fundraising capacity of events and provide direct support to programs.

**WHY?** To increase corporate support of the Chapter by providing Chapter-wide sponsorship opportunities and delivering more value through greater exposure with the Chapter.

	<b>Specific actions</b>	<b>Responsibility</b>
<b>FY09</b>	1. Identify protocol for cultivation of Chapter's corporate partners before start of FY09 and establish comprehensive tracking throughout FY09.	Executive Team
<b>FY10</b>	1. ID giving levels across all programs/events	Executive Team
	2. Establish the "ask" protocol for Chapter-wide corporate proposals (i.e. sales packet).	Executive Team
	3. Identify new prospects for corporate partnerships of events, programs, and Chapter-wide support (on-going).	Executive Team

## 4 Income Generation

**Objective #3:** We will have positive or neutral growth with leadership events (WAMS, DOC) and positive growth in mass market events (Bike MS, Walk MS).

**WHY?** To continue to support the primary means of Chapter income through strategic management and growth of our events.

	<b>Specific actions</b>	<b>Responsibility</b>
<b>FY09-FY11</b>	<b>WAMS/DOC:</b>	Development Director and Development staff
	1. Maintain existing giving level for Leadership events (WAMS & DOC)	
	2. Continually grow Steering Committee and identify Fundraising Committees (i.e. honorary Chairman, advisory Committees, etc); infuse mission messaging to enhance value of events for the Chapter.	
	<b>Bike MS:</b>	Development Director, Development Manager-Bike MS, and Events Manager
1. Secure positive income growth annually		
2. Increase corporate support (new partners, increased value, increased fulfillment benefits)		
3. Identify means for increased rider support: (i.e. new cyclists, increase paid average, higher minimum, etc)	Development Director, Development Manager-Walk MS, and Events Manager	
<b>Walk MS:</b>		
1. Secure positive income growth annually		
2. Increase corporate support (new partners, increased value, increased fulfillment benefits)		
3. Consider a minimum donation for Walk MS registration		
4. Identify means for increased walker support: (i.e. new walkers, increase paid average, higher minimum, new sites, etc)		

## 4 Income Generation

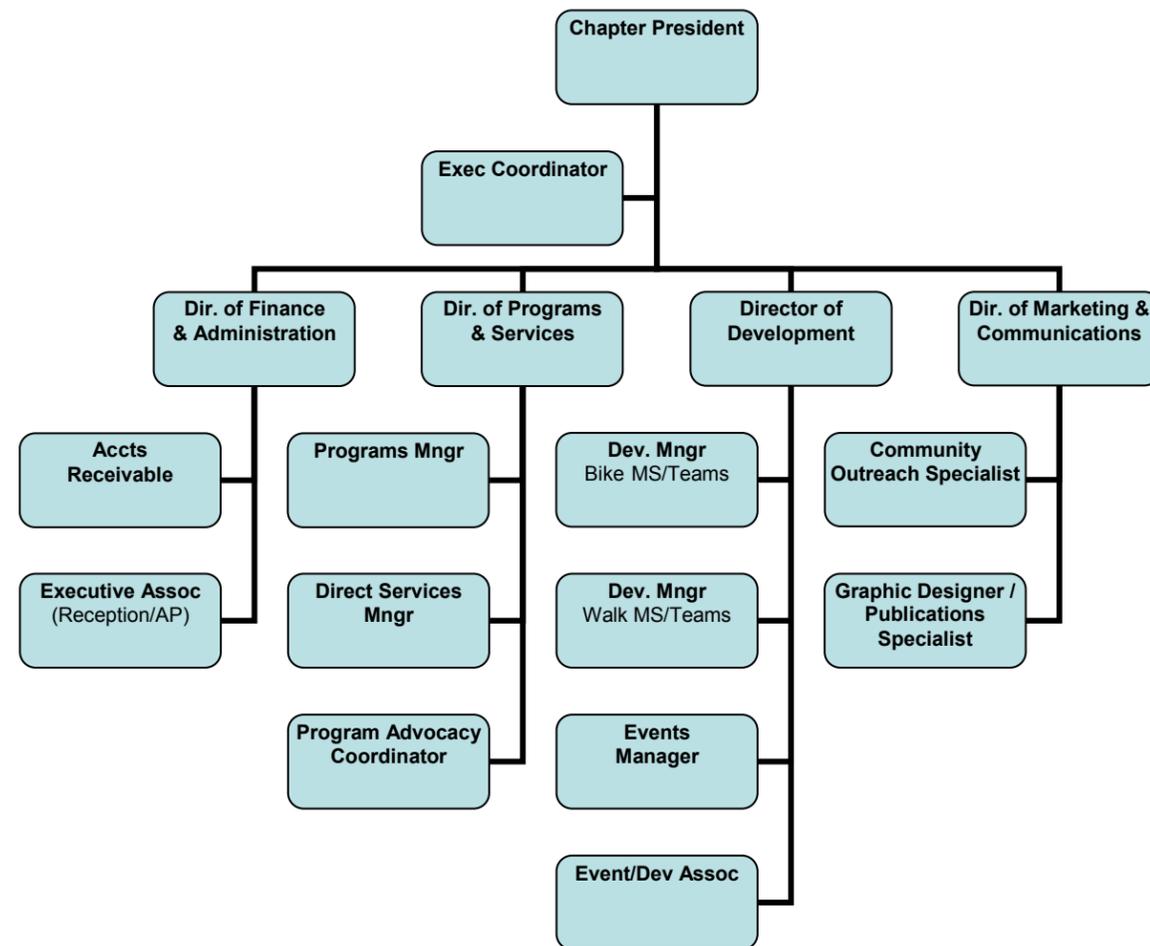
### Measuring Our Progress

Measure	Current Score (FY08)	Desired Score (FY2011)
Total Budget	\$2.6 million	7.5% increase annually, which will yield \$3.5 M by 2011
Corporate Partners	\$175-\$200K	25% growth by Oct. 2010
Grant Proposal	\$50,000 annually	100% growth by Oct. 2010
Leadership Events	WAMS - \$110K DOC - \$125K	WAMS - \$110K + DOC - \$125K +
Mass Market	Walk - \$440,000 Bike - \$1.5 million	7.5% increase annually



# Structure and Staffing

## The current organizational structure of the Chapter



# Structure and Staffing

## Key Roles and Responsibilities

### Board

- Strategic development and growth of the Chapter.
- Cultivation of donors and financial supporters of the Chapter.
- Leadership (through Chairmanships) and development of volunteer committees of the Chapter.

### Staff

- Day-to-day operations of the Chapter.
- Cultivation of community partnerships.
- Provides staff support to volunteer committees of the Chapter.

### Standing Committees

#### Executive Committee

- Provides executive oversight of the Board operations and providing guidance to the Chapter President on strategic initiatives of the Chapter.

#### Governance Committee

- Recruitment, orientation and selection of new Trustees and conducting Board and Trustee evaluations.

#### Finance Committee

- Oversight of the financial reports of the Chapter, including review of the financial statements prior to each Board meeting.

#### Audit Committee

- Selects auditors for the Chapter and receives/responds to the report of the auditors annually.

### Management Committees

#### Clinical Advisory Committee

- Provides oversight to the Chapter's clinical partnerships and strategies.

#### Programs Committee

- Provides guidance to the Chapter's development of programs and services to people affected by MS.

#### Marketing Committee

- Provides guidance on the development of Chapter marketing plans and initiatives.

#### Development Committee

- Provides guidance on the development of Chapter fundraising strategies, initiatives and contacts. This committee will also provide general oversight to event management committees including Bike MS, Walk MS, Dinner of Champions and Women Against MS.

#### MS Institute Committee

- Provides guidance on the development of an MS Institute in Utah.

#### Government Relations Committee

- Provides guidance on state and federal legislative issues affecting people with MS.

# Structure and Staffing

## Organizational Architecture and Fit

In order to achieve the strategic priorities of this plan, the Chapter will need to realign its personnel, financial and operational resources to address the following structural needs of the Chapter:

### Administration

- The Chapter will need to invest in professional development of staff in the areas of community development, data management and analysis, and fund development.
- The Strategic Plan should be reviewed annually for effectiveness and progress toward defined goals. The annual Operational Plan of the staff should be evaluated every six months in order to assess progress and make adjustments to achieve the strategic goals.
- Data systems need to provide more timely, targeted and relevant data to support fundraising and to manage client and membership data.
- We will need to define how activism, advocacy and government relations can advance the mission of the Society and objectives of this plan.

### Programs & Services

- The Department will need to realign their primary focus to developing community partnerships for service delivery while maintaining quality educational programs.
- We will need to identify resources (personnel and others) to enhance exposure in Utah County.
- We will need to capture more service information in Altair (the Society's data system) to include program participation, community partners, and clients served to provide relevant data for program evaluation and strategic growth.

### Marketing

- We will need to identify a means to secure more involvement from media partners.
- A Chapter "Story Bank" with unique client experiences which can be used to target media and community requests will need to be developed and maintained.
- A comprehensive Chapter-wide marketing plan will need to be developed to create a focused marketing direction for the Chapter (compared to the current project-only plans).
- We will need to place more focus and integrity of web and e-communications.
- We will need to establish a marketing tracking system.
- The Chapter will provide more support (staff or volunteer) for web site management.
- Our current focus on community engagement will need to broaden to support Chapter-wide community partnerships, volunteer initiatives, and community integration with all functional areas of the Chapter.

### Development

- The Chapter will need to broaden our work processes to incorporate a structure for traditional giving.
- Gift acknowledgement processes will need to be implemented to acknowledge gifts and to cultivate donors.
- We will need to define roles for corporate relationship management, major gifts cultivation and management, foundation giving, etc.
- We will need to define roles for the Board and Development Committee to support fundraising efforts.