GOAL I:
People have effective treatment choices and solutions to the challenges of living with MS

STRATEGY 1:
Expand investments and worldwide collaboration to accelerate research

RESEARCH ANSWERS QUESTIONS TO ADDRESS UNMET NEEDS
Achieved through:

- Investments in MS research
  - FY16 goal target:
    - $53.9 million in MS research investments
- Clinical trials testing new solutions
  - FY18 plan-end goal targets:
    - 10% increase over FY15 year-end in clinical trials involving relapsing MS = 320
    - 20% increase over FY15 year-end in clinical trials involving progressive MS = 212
    - 10% increase over FY15 year-end in clinical trials focused on wellness approaches and symptom management = 170
- Patent applications and clinical trials of novel approaches for all forms of multiple sclerosis
  - FY16 strategy target:
    - 5% increase in MS-related patent applications = 9,364

Q1 PROGRESS

ACTIVE CLINICAL TRIALS

<table>
<thead>
<tr>
<th></th>
<th>FY16 Q1</th>
<th>FY18 Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relapsing MS</td>
<td>150</td>
<td>250</td>
</tr>
<tr>
<td>Progressive MS</td>
<td>50</td>
<td>100</td>
</tr>
<tr>
<td>Wellness / Symptoms</td>
<td>50</td>
<td>100</td>
</tr>
</tbody>
</table>

$36 M Investment in MS research

MS-RELATED PATENT APPLICATIONS
180 New
9,098 Total

RESEARCH HIGHLIGHTS

- Positive results for both relapsing and progressive MS from three phase 3 trials of ocrelizumab
- Unique eye-related research collaboration awarded 2015 Barancik Prize for Innovation in MS Research
- Three studies suggested vitamin D may protect the brain, help repair myelin, and regulate MS immune responses
GOAL I:
People have effective treatment choices and solutions to the challenges of living with MS.

STRATEGY 2:
Seize opportunities and build pathways with government, communities, and the private sector so people with MS get what they need

ADVOCACY RESULTS IN NEW AND EXPANDED RESOURCES
Achieved through:

- Increased engagement with policy decision-makers
  - FY16 goal targets:
    - 20% increase of District Activist Leaders$^\text{1} = 251$
    - Improvement in 25% of elected official relationships
    - Grasstips$^2$ relationships (target under development)

- New and expanded resources
  - Ongoing goal/strategy target:
    - Progress toward legislation and regulations adopted at the state* and/or federal level

Q1 PROGRESS

<table>
<thead>
<tr>
<th>DISTRICT ACTIVIST LEADERS</th>
<th>205 Total Grasstips Relationships</th>
</tr>
</thead>
<tbody>
<tr>
<td>17 New</td>
<td>226 Total</td>
</tr>
</tbody>
</table>

PROGRESS ON PRIORITY POLICY ISSUES

- MS Congressionally Directed Medical Research Program (CDMRP)
  - $1 million increase
  - $6 million total in FY16

- National Institutes of Health (NIH)
  - $2 billion increase
  - $32.1 billion total in FY16

- Lifespan Respite Care Program
  - $1 million increase
  - $3.36 million total in FY16

- Social Security Administration (inclusive of timely review, approval and management of disability claims)
  - $350 million increase
  - $12.16 billion total in FY16

- Food and Drug Administration (inclusive of timely review and approval of new therapies)
  - $120 million increase
  - $2.72 billion total in FY16

CO-SPONSORS ON FEDERAL PRIORITIES

- Advancing Research for Neurological Diseases Act
  - H.R. 292 (House) — 114 cosponsors
  - S. 849 (Senate) — 19 cosponsors

- Ensuring Access to Quality Complex Rehabilitation Technology Act
  - H.R. 1516 (House) — 156 cosponsors
  - S. 1013 (Senate) — 14 cosponsors

- Lifespan Respite Care Reauthorization Act
  - H.R. 3913 (House) — 9 cosponsors

*Most state legislative sessions kick off after January, after which point legislation may be introduced. Groundwork on state policy priorities coming in Q2 report.
GOAL I:
People have effective treatment choices and solutions to the challenges of living with MS.

STRATEGY 3:
Influence, lead and collaborate to expand resources to ensure access to healthcare

HEALTHCARE MEETS INDIVIDUAL NEEDS
Achieved through:
- People with healthcare that meets their needs
  - FY16 goal targets:
    - Offer healthcare providers Institutional Clinician Training Awards and Individual Fellowships\(^3\)
    - 10% increase in number of Partners in MS Care\(^4\) = 278
  - FY16 strategy targets:
    - Targeted healthcare providers participate in MS-related education
    - 50% of Partners in MS Care make referrals to the Society using referral form = 800 referrals

Q1 PROGRESS

- **5** New Individual Clinical Fellowships
- **2** New Institutional Clinician Training Awards
- **166** Healthcare providers participated in collaborative continuing medical education programs
- **15** New Partners in MS Care
- **267** Total Partners in MS Care
- **254** New referrals from Partners in MS care

The confounding problems represented by progressive MS will never be solved until well-funded trials are directed specifically at this disease subtype, a circumstance that finally seems to be coming to fruition. And that’s no small thing.”

– Marc Stecker, MS blogger, WheelchairKamikaze.com
GOAL II: People affected by MS connect to the individuals, information and resources they need to move their lives forward

STRATEGY 4: Connect people affected by MS to one another and share life experiences and solutions

STRATEGY 5: Connect people to information and resources so that they can take fully informed actions

PEOPLE WITH MS ARE CONNECTING EARLIER IN THEIR MS JOURNEY

Achieved through:

- People newly diagnosed who report knowledge of the Society and connect
  - Ongoing goal targets:
    - Increase in people newly diagnosed connecting online (targets in development)
    - More people get information they need when they need it through Knowledge Is Power®

Q1 PROGRESS

- 236 New Newly diagnosed MSconnection.org members
- 4,892 Total Newly diagnosed MSconnection.org members
- 31,930 Newly diagnosed webpage views
- 708 Newly diagnosed individuals contacted the Information Resource Center
- 700% Knowledge Is Power (KIP) program more digitally accessible and more personalized, leading to nearly 700% increase in online KIP visitors from 35/day to 380/day
GOAL II:
People affected by MS connect to the individuals, information and resources they need to move their lives forward

PEOPLE AFFECTED BY MS ARE CONNECTING TO THE SOCIETY FOR WHAT THEY NEED WHEN THEY NEED IT
Achieved through:
• Lasting connections through Society channels
  ○ FY16 goal targets:
    • Increased impact as a result of more deeply engaged self-help group leaders and members, and gaps in support intentionally filled
    • 10% increase in number of MSconnection.org online community groups = 435
  ○ FY16 strategy targets:
    • People connect to others with similar experiences for support and to reduce isolation
    • 20% increase in social media followers
    • Maintain 40% Facebook engagement (Twitter and Instagram engagement targets in development)

Q1 PROGRESS

SELF-HELP GROUPS
25 New
groups specifically addressing previous geographic and demographic gaps
1,134 Total

MSCONNECTION.ORG ONLINE COMMUNITY GROUPS
27 NEW GROUPS CREATED IN Q1

MS Friends
34 volunteers connected to 640 callers per month, 141 new/unique callers per month

Peer Connections
70 volunteers connected to 93 new peers, 73 ongoing peers through online or phone connection

752,549 Social media followers (14% increase)

FACEBOOK SOLICITS SOCIETY PARTNERSHIP ON NEW TOOLS FOR NONPROFITS
• Selected because of our highly engaged Facebook community
• Society Facebook page engagement >40% vs. avg. business page engagement <2%

Q1 SOCIAL MEDIA ENGAGEMENT
Engagement = actions taken in response to Society posts (e.g. likes, comments, retweets), divided by total number of social media followers.

FACEBOOK: 40.6%
TWITTER: 3.4%* (Average Twitter engagement for top 25 brands is .07%)
INSTAGRAM: 54.3%
TOTAL: 38.6%
GOAL II: People affected by MS connect to the individuals, information and resources they need to move their lives forward

PEOPLE FIND THE CONNECTIONS THEY NEED TO LIVE THEIR BEST LIVES
Achieved through:
- Lasting connections through Society channels
  - FY16 goal targets:
    - 20% growth in MSconnection.org membership = 43,000
    - 10% growth in MSconnection.org engagement (metrics available FY16 Q2)
  - FY16 strategy target:
    - 20% increase in MSconnection.org connections (metrics available FY16 Q2)

Q1 PROGRESS

1,196 37,374
New MSconnection.org members Total MSconnection.org members

PEOPLE FEEL BETTER EQUIPPED TO MOVE THEIR LIVES FORWARD
Achieved through:
- People reporting satisfaction/quality of connections made
  - Ongoing goal targets:
    - Minimum 95% satisfaction with Information Resource Center services
- People take action as a result of receiving the information and/or resources they need
  - FY16 strategy target:
    - Email click-throughs (target in development)

Q1 PROGRESS

- How satisfied are you with the service you received from the National MS Society?

66,304
eNews click-throughs

“
I have felt so isolated. I am so happy to feel connected again. It is very hard for me to type now and so nice to talk to someone. I am not alone!”
– Anonymous caller, Information Resource Center
GOAL III:  
Individuals and organizations are mobilized to generate resources that accelerate progress and maximize impact

STRATEGY 6:  
Accelerate revenue growth and increase resources

WE BUILD CAPACITY AND EFFECTIVELY GENERATE AND DEPLOY RESOURCES TO FUND THE STRATEGIC PLAN

Achieved through:

- Revenue goal met or exceeded
  - FY16 goal targets:
    - Individual giving will grow by 5%, raising $29.5 million
    - Walk MS revenue will grow by 4.9% raising $48.8 million
    - Bike MS will grow by 6.5% raising $87.4 million
  - FY16 strategy targets:
    - MuckFest MS revenue will grow by 13% raising $3.61 million
    - Challenge Walk MS revenue will grow by 8.9% raising $3.8 million

Q1 PROGRESS

- **Sanofi Genzyme** continues national sponsorship of the Bike MS ‘I Ride with MS’ program through support of $350,000
- **Novartis Pharmaceuticals Corporation** returns as the Premier National Sponsor of Walk MS through a $950,000 sponsorship
- **Abbvie** secured as first national MuckFest MS sponsor, valued at $225,000
GOAL III: Individuals and organizations are mobilized to generate resources that accelerate progress and maximize impact

STRATEGY 7: Engage each person and organization in the MS movement at their highest level

WE HAVE ENDURING RELATIONSHIPS THAT EXCEED CONSTITUENT EXPECTATIONS

Achieved through:
- Constituent retention and acquisition
  - FY16 goal targets:
    - Increased number of activists (target in development)
    - Increase activist engagement from 31% to 51%
    - Increase number of mid-level donors to 16,453
    - Increase number of major donors to 1,817
    - Special event and individual giving retention and acquisition (targets in development)
    - Top level rating among organizations that rate and rank nonprofits, instilling constituent/donor trust and confidence in the Society
  - FY16 strategy target:
    - 100% of offline donor transactions managed by the Constituent Information Center

Q1 PROGRESS

ACTIVE MID-LEVEL DONORS

- FY16 Target: 25,000
- FY16 Q1: 20,000

ACTIVE MAJOR DONORS

- FY16 Target: 3,000
- FY16 Q1: 2,500

RETENTION AND ACQUISITION

- Special event retention: Coming in Q2 report
- Special event acquisition:
  - Bike MS: 7,530 (8,360 in FY15 Q1)
  - Walk MS: 8,530 (8,380 in FY15 Q1)
- Individual giving retention and acquisition: Coming in Q2 report

40,428 ENGAGED ACTIVISTS
Defined as taking action by sending action alerts within the fiscal year

114,000 TOTAL ACTIVISTS
Reflects the total number of people signed up in the grassroots network, regardless of action taken

NATIONAL HEALTH COUNCIL

HIGHEST LEVEL RATING
The National MS Society meets the highest standards of accountability, ethical practice, organizational effectiveness, and good public stewardship

81% of offline donor transactions managed by the Constituent Information Center
GOAL III:
Individuals and organizations are mobilized to generate resources that accelerate progress and maximize impact

STRATEGY 8:
Equip volunteers and staff with tools and resources to achieve desired results

STAFF AND VOLUNTEERS ARE SUPPORTED SO THEY ARE MOBILIZED, FULLY ENGAGED, POWERFUL AND EFFECTIVE LEADERS

Achieved through:

- Employees and volunteers aligned with the Strategic Plan and have the ability to develop and expand influence
  - Goal target:
    - Track and manage alignment plan status: Red, yellow, green

Q1 PROGRESS

FINANCE: GREEN
- Upcoming milestones:
  - Denver processing center launch — February 2016
  - Plan Spring 2016 launch of the NYC processing center
  - Society banking solution Request for Proposal to identify Society accounts receivable process and tools

HUMAN RESOURCES: GREEN
- Society matching 401(k) established for all employees
- Upcoming milestones:
  - New learning and development system conversion is in progress; completion expected FY16 Q2

INFORMATION TECHNOLOGY: GREEN
- Upcoming milestones:
  - The new Data Warehouse, custom User Interface, and the new Board Business Intelligence applications launch on Tuesday, February 16

MARKETING: GREEN
- Society-wide planning for implementation is underway and on track

SERVICES: GREEN
- Society-wide planning for implementation is underway and on track

CONSTITUENT RELATIONSHIP MANAGEMENT TOOL: GREEN
- Project is on schedule, within budget and within scope

GREEN STATUS:
Milestones to achieve outputs are within 0–29 days of plan. Budgeted/non-budgeted resources must also be less than 5% of the total project expense, or less than $50,000 (whichever is greater).

YELLOW STATUS:
Two or more milestones to achieve outputs are between 30–60 days past plan due date.

RED STATUS:
One or more milestones to achieve outputs is more than 60 days past plan due date, and/or implementation date is delayed by more than 60 days.

"My first showing at Walk MS and I raised over $12,500!! So proud! I reached out to friends and family with a no-pressure approach. Shared my story, asked for their help, and the gifts started coming in."

– Barb, Walk MS: Chicago Lakefront 2015
1. **District Activist Leaders** build and foster critical, lasting relationships with their elected officials (in their legislative districts) that will help the MS movement influence policy issues at the federal, state and local level. District Activist Leaders serve as the liaison between the Society and their local MS community.

2. A **Grasstops volunteer** is someone who has a close, personal connection with a local official, a state or federal legislator or official, an individual serving at a key government agency, or an influential staff person for any of the above figures. From time to time, grasstops volunteers may be called upon to leverage relationships on behalf of the Society and our mission, and/or facilitate an introduction with Society staff.

3. **Fellowship opportunities for healthcare providers** —
   - **Institutional Clinician Training Award**: Five-year awards to mentors and institutions to provide training for board-certified/eligible neurologists and psychiatrists in MS specialist care. Training will include new and follow-up patient consultations and treatment under the supervision of an MS specialist physician along with participation in a multidisciplinary team, lectures, and professional meetings.
   - **Individual Fellowships**: One-year, post-residency MS clinical fellowship program designed to train board-certified/eligible neurologists or psychiatrists in specialized MS clinical care. This 12-month program provides fellows with the opportunity to perform new patient consultations and follow-up evaluations under the supervision of an MS specialist.

4. The **Partners in MS Care** program recognizes and acknowledges committed healthcare professionals whose practices improve access to high-quality care for people with MS to live their best lives. Partners include healthcare professionals in the areas of neurology, mental health and rehabilitation, as well as sites that provide multidisciplinary healthcare.

5. **Knowledge Is Power** (KIP) is an introduction and guide to living with MS for those who are recently diagnosed or have a loved one who was recently diagnosed.

6. **MSconnection.org** is a social networking website and online community for people living with MS, their loved ones and experts to connect in a safe and secure environment.

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