

2017-2020

# Strategic Plan

Uniting to care & cure

# Table of Contents

Message from the President & CEO .....	Page 2
Overview .....	Page 3
Mission .....	Page 4
Core Values .....	Page 5
2017-2020 Objectives & Strategies .....	Page 6
Mission Priorities .....	Pages 7-22
Research .....	Page 7
Education, Support & Advocacy .....	Page 11
Traditional Revenue .....	Page 17
Non-Traditional Revenue .....	Page 20

# Message from the President & CEO

2017 is a big year for the Crohn's & Colitis Foundation. It's our 50th anniversary, and a great opportunity to celebrate past achievements. Perhaps even more important, this year we're launching a new brand and a new four-year strategic plan, the result of an in-depth, organization-wide process that represents vital input from patients and caregivers, as well as informed insights and months of research and planning by all of our key constituencies.

The IBD landscape is constantly shifting and presenting promising opportunities to advance research and the development of new treatments. The 2017-2020 strategic planning process required us to ask some critically important questions – “What are our most essential priorities?” and “How will we secure the necessary resources to succeed?” Throughout, the individual IBD patient remained at the heart of all our planning. Our commitment to improving lives drove every decision.

The Crohn's & Colitis Foundation's Strategic Plan is our roadmap to a clear destination. It provides the best pathways to achieve the objectives set for each of our central priorities: Research; Education, Support & Advocacy; Traditional Revenue; and Non-Traditional Revenue. This Plan is critical, because it lays out not just what we must accomplish from 2017 to 2020, but what we want to be, for and within the IBD community.

Even as we introduce this new Strategic Plan, our Class A team of staff and volunteers all across the organization are already raising the bar, setting new plans in motion, and working smarter. There has never been a more exciting time at the Foundation. Every day, we are increasingly making a tangible difference in the lives of children and adults with Crohn's disease and ulcerative colitis. This new Plan will help guide and accelerate all that we do for the IBD community.

Thank you for your passion and commitment to our mission!

A handwritten signature in black ink that reads "Michael Osso". The signature is fluid and cursive, with the first name being more prominent.

Michael Osso  
President & CEO

# Overview

Our 2017-2020 Strategic Plan reaffirms the Crohn's & Colitis Foundation's mission and core values, while offering an evolved, overarching goal to help guide our decision-making going forward.

Through the execution of this Strategic Plan, the Crohn's & Colitis Foundation will be:

**A patient-centered and trusted hub of the IBD community working to improve IBD patients' lives at every step of their journeys, being the go-to resource for IBD information and support, driving collaboration, and accelerating treatments and cures.**

Specific objectives are articulated for each of our four priorities (Research; Education, Support & Advocacy (ESA); Traditional Revenue; and Non-Traditional Revenue), as are the strategies we'll employ to achieve them.

In addition, our objectives and strategies don't stand alone, but are designed to reinforce and strengthen each other across mission priorities to create greater impact. For example, we plan to work in a variety of ways to build awareness and deepen volunteer engagement, leveraging the passion and generosity of our patients and their caregivers to engage additional constituencies within the IBD community and enable innovative fundraising.

With our new Strategic Plan to guide our activities, and a new brand to more fully engage and inspire our constituents, we embark on the next four years with confidence and a renewed passion for realizing our vision — to create a future free of Crohn's disease and ulcerative colitis.

# Mission

Our mission does not change. We are totally committed:

*To cure Crohn's disease and ulcerative colitis, and to improve the quality of life of children and adults affected by these diseases.*

# Core Values

While this Strategic Plan provides the roadmap for the Foundation's activities and initiatives, how we treat each other, make decisions, and stay grounded from (sometimes hectic) day to day depends on our core values. Just as our mission hasn't changed, nor have these principles and standards that are the bedrock of the Foundation's organizational culture:

- **Compassion.** We are empathetic and respectful of all our constituents and colleagues. We acknowledge patients' struggles, while remaining supportive, proactive, and hopeful.
- **Commitment.** We are first and foremost committed to every child and adult battling IBD. The patients drive our unrelenting focus on doing whatever it takes to improve their lives.
- **Integrity.** We are honest and adhere to the highest moral principles. We earn and maintain our constituents' utmost trust.
- **Leadership.** We play a unique and critical role as convener and catalyst in the IBD community. We have the proven strength, experience, and reputation to articulate and realize an inspiring vision.
- **Partnership.** We engage and collaborate with every constituency impacted by IBD, because we know that we can achieve our mission only by working together. Our partnerships are diverse and innovative, breaking new ground and forging powerful collaborations to achieve key mission objectives.
- **Accountability.** We set aggressive, but achievable goals. We are open and transparent about how we conduct our activities, and are accurate in reporting our outcomes.

# 2017-2020 Objectives & Strategies

The *Objectives* outlined here for each of our *Mission Priorities* are ambitious. Moreover, these objectives are designed to reinforce and strengthen each other, with built-in synergies to help ensure our impact as a whole is much greater than the sum of the Foundation's many and diverse programs and initiatives.

*Strategies* tied to each objective were developed collaboratively for each priority area, and finalized in consultation with staff and board leadership. Five concepts drove the development of all of our strategies:

- 1.** Mindful of the patient journey, we embrace a patient-centric approach to all decision-making and mission delivery.
- 2.** We generate, disseminate, and use data to inform and drive decisions to maximize revenue generation and mission activities.
- 3.** We demonstrate measureable impact by tailoring communications to segmented stakeholder groups to inspire hope and action.
- 4.** We ensure a Class A team of staff and volunteers to power organizational priorities.
- 5.** We build partnership and collaboration into every aspect of the business.

Specific *Tactics* have also been identified to support each strategy, along with *Strategic Measures* to enable us to track progress, make course corrections when necessary, and ensure accountability and efficiency.

# Mission Priority: Research

## OVERARCHING AIM:

*The Foundation will focus efforts to accelerate and overcome hurdles to drive the continuum from new discovery to optimal care.*

## OBJECTIVE #1

*Launch Plexus as a member-supported research exchange that will reduce inefficiencies, standardize data, and remove traditional barriers to accelerate progress toward comprehensive precision medicine initiatives and other efforts to improve optimal care.*

- **Strategy A:** Identify the required capabilities to support all aspects of Plexus, including, but not limited to IT, operations, and finance and determine the most cost-effective way to meet resourcing needs, whether it's bringing the expertise in-house or outsourcing services.
- **Strategy B:** Identify the required capabilities to ensure the quality of data and samples are research grade, reliable, and usable, and determine the most cost-effective way to meet resourcing these needs.
- **Strategy C:** Develop a detailed sustainability plan and long-term governance plan that explores risk/benefits of the following scenarios: 1) Keeping IBD Plexus operations in-house, 2) partnering with another company or companies, 3) managed by an outside organization.
- **Strategy D:** Attract scientists to use Plexus resources to address scientific questions that will improve the current treatment paradigm of patients with IBD.



# Mission Priority: **Research**

## **OBJECTIVE #2**

*Create mechanisms to accelerate innovative healthcare-improving products reaching patients.*

- **Strategy A:** Implement an entrepreneurial investment program that allocates significant funds to advance novel products towards later development steps.
- **Strategy B:** Create other defined pathways to support and commercialize promising research candidates.
- **Strategy C:** Advocate and collaborate with the FDA to advance more quickly IBD therapies and diagnostics.
- **Strategy D:** Collaborate with Education, Support & Advocacy to support the Clinical Trials Community initiative.
- **Strategy E:** Explore mechanisms to bring together academia and community practices along with industry to promote clinical research in IBD.

# Mission Priority: **Research**

## **OBJECTIVE #3**

*Create mechanisms to more rapidly assess the human relevance and predictive value of preclinical and clinical approaches and findings.*

- **Strategy A:** Explore more high risk/high reward opportunities that could shorten the time to bring interventions to humans; and prioritize when possible, short-term projects, which means faster access to results, new areas of study, identification of failure points, and keeping up with technological advances.
- **Strategy B:** Support core capabilities that enable faster and more likely successful translation of findings towards applied use in humans.
- **Strategy C:** Prioritize pre-clinical studies that are likely to promote either better use of current therapies or identifying new therapies.
- **Strategy D:** Identify and develop infrastructure to more efficiently implement early phase clinical trials and comparative effectiveness studies.

# Mission Priority: **Research**

## **OBJECTIVE #4**

*Assure a pipeline of junior investigators is robust and innovative in support of the research mission of the Foundation.*

- **Strategy A:** Maintain current funding levels to support training and junior-investigator awards that are relevant to IBD.
- **Strategy B:** Develop programs and/or processes to engage trainees and junior investigators in new priority research areas for the Foundation.
- **Strategy C:** Create mechanisms to support enhancement of the mentoring and leadership experiences available for junior investigators.

# Mission Priority: **Education, Support & Advocacy**

## **OVERARCHING AIM:**

*Leveraging the potential for interconnections and synergies among patient education and support, professional education and advocacy, we will address: Cost and access to care, shared decision making, and maximizing the quality of care, while acknowledging and concentrating on the patient journey.*

## **OBJECTIVE #1**

*Empower patients and caregivers to engage in effective communication with their providers, emphasizing shared decision-making related to their care.*

- **Strategy A:** Identify existing needs and challenges in communications and shared decision-making between adult and pediatric patients—and their caregivers—and providers.
- **Strategy B:** Deliver programs for adult and pediatric patients, caregivers, and providers that improve patient engagement in the decision-making process.

# Mission Priority: **Education, Support & Advocacy**

## **OBJECTIVE #2**

*Encourage and engage patients and caregivers in contributing ideas and participating in studies as an essential step toward accelerating research and new treatments.*

- **Strategy A:** Leverage Clinical Trial Ambassadors to engage local providers and increase the visibility of the Foundation research initiatives and the Clinical Trial Community.
- **Strategy B:** Develop tools, education, and resources for patients, caregivers, and providers to support discussions and in engagement in the Clinical Trial Community, IBD Partners and patient cohorts.

# Mission Priority: **Education, Support & Advocacy**

## **OBJECTIVE #3**

*Create a community of IBD stakeholders that advocates for access to care and addresses high cost of care issues.*

- **Strategy A:** Work toward change in current state-based access and cost policies through the design and implementation of state-based advocacy campaigns.
- **Strategy B:** Address access and cost issues in the federal insurance programs through strategies in conjunction with stakeholders and the Center for Medicare and Medicaid Services.
- **Strategy C:** Disseminate financial management program to educate patients and caregivers about navigating insurance, financial assistance resources, and insurance management tools to help plan annual IBD costs.
- **Strategy D:** Leverage discoveries and insights from an IBD Cost Analysis, working in partnership with other non-profits, government, industry, payers, and other stakeholders to address high costs of care.

# Mission Priority: **Education, Support & Advocacy**

## **OBJECTIVE #4**

*Increase patient and caregiver engagement with the Foundation.*

- **Strategy A:** Create and launch IBD awareness marketing efforts to increase recognition of, and engagement with, the Foundation.
- **Strategy B:** Increase awareness and dissemination of the Foundation's education, support, and advocacy resources using marketing strategies focused on engaging patients earlier in their disease.
- **Strategy C:** Leverage IBD Qorus sites to increase engagement with IBD patients and access the Foundation's resources early in their care, as well as throughout their disease journey.

# Mission Priority: **Education, Support & Advocacy**

## **OBJECTIVE #5**

*Create a culture where pediatric and adult patients, caregivers, and providers proactively discuss psychosocial issues as part of routine IBD care.*

- **Strategy A:** Create resources and educational programs targeted toward providers to ensure psychosocial considerations are part of routine patient care for IBD.
- **Strategy B:** Normalize the psychosocial element of IBD by creating specific communication tools to empower patients and caregivers to proactively address disease-coping concerns with their healthcare providers and support networks.
- **Strategy C:** Expand digital support resources, leveraging existing, partnering with others, or creating new programs to effectively address and empower activation around psychosocial issues.



# Mission Priority: **Education, Support & Advocacy**

## **OBJECTIVE # 6**

*In collaboration with patients and providers, work to improve the quality of care delivered to patients with IBD.*

- **Strategy A:** Realize insights into clinical best practices and performance analysis to recommend action around correcting or reducing care variations for participating IBD Qorus sites.
- **Strategy B:** Develop an IBD Qorus business plan to drive expansion of IBD Qorus as an innovative care model.
- **Strategy C:** Identify and disseminate characteristics of quality of care to patients and caregivers to empower them to recognize providers who meet their needs.

# Mission Priority: **Traditional Revenue**

## **OVERARCHING AIM:**

*The Foundation will empower volunteers to expand the network of donors and volunteers, develop enduring relationships, and drive increased contributed support.*

## **OBJECTIVE # 1**

*Every volunteer has a meaningful and robust experience in partnership with the Foundation.*

- **Strategy A:** Recruit, engage, and cultivate volunteers through a deliberate process that will help to form enduring relationships.
- **Strategy B:** Maximize volunteer engagement to lead the organization in building local communities and attracting resources.

# Mission Priority: **Traditional Revenue**

## **OBJECTIVE # 2**

*Create a culture that celebrates excellence in data collection and analysis that will empower decision-making.*

- **Strategy A:** Use data to guide decisions that will drive revenue growth.
- **Strategy B:** Empower volunteers by providing them with data needed to be successful in expanding their reach to grow the Foundation's volunteer base.

# Mission Priority: **Traditional Revenue**

## **OBJECTIVE # 3**

*Inspire donors, volunteers, corporations, and foundations by providing them with compelling knowledge and information about the Foundation's mission progress and accomplishments.*

- **Strategy A:** Ensure the mission is well-shared and visible at all Foundation events.
- **Strategy B:** Develop strategic and ongoing personalized communications with appeals that inspire action to support the Foundation's mission.

# Mission Priority: **Non-Traditional Revenue**

## **OVERARCHING AIM:**

*The Foundation will form strategic partnerships with entities that emanate from and advance specific mission activities.*

## **OBJECTIVE # 1**

*Generate new revenue sources, establish new approaches, and build new corporate relationships from mission activities.*

- **Strategy A:** Evaluate existing mission-based assets to determine revenue-generating opportunities and program objectives that align well with those of a diverse group of commercial and non-profit partners.
- **Strategy B:** Create *new* mission-based activities that present revenue opportunities through partnership with outside entities.
- **Strategy C:** Establish collaborative partnerships with complementary organizations that will advance revenue and mission goals.

# Mission Priority: **Non-Traditional Revenue**

## **OBJECTIVE # 2**

*Create new revenue campaigns that will diversify the Foundation's corporate portfolio and deepen existing corporate partnerships.*

- **Strategy A:** Engage the Foundation's extensive, nationwide volunteer network to facilitate meaningful introductions with corporate leaders.
- **Strategy B:** Attract new corporate partners to raise awareness of, and generate revenue support for, the Foundation's mission through a national cause marketing campaign.
- **Strategy C:** Develop and deploy a formal Corporate Employee Giving campaign to generate new revenue via increased collaboration with existing and new partners.

# Mission Priority: **Non-Traditional Revenue**

## **OBJECTIVE # 3**

*Identify and develop two unique approaches to revenue generation.*

- **Strategy A:** In partnership with volunteers, create a process to identify innovative initiatives for revenue generation.
- **Strategy B:** Establish mechanisms to pilot test up to five new revenue-generating programs.
- **Strategy C:** Use discoveries and insights from pilot testing to inform process and infrastructure development of the new programs, including staffing, IT, marketing, and other appropriate areas.