



**Community Health Outreach Work
(CHOW) Project**

2012-2015 STRATEGIC PLAN
and Resource Development Strategies



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INTRODUCTION

The Community Health Outreach Work (CHOW) is a Hawaii-based 501(c)(3) nonprofit organization founded in the early 1990s. CHOW has a successful 19-year history evolving from its original charter in 1993 to prevent the transmission of HIV/AIDS and other blood-borne pathogens among high-risk drug users, especially injection drug users. From its offices in Honolulu, CHOW currently employs ten people, seven of whom are locally based outreach workers serving Oahu and the Neighbor Islands. By 2011, CHOW had exchanged more than 601,000 syringes statewide since it began its syringe exchange program in 1993.

Richard Male and Associates (RMA), who assisted CHOW in the preparation of this plan, is a Colorado-based management consulting firm founded in 2000 that provides leadership and organizational development, strategic planning, and fundraising support to the nonprofit/NGO sector worldwide. CHOW and RMA worked together to develop a proposal to the Hawaii Community Foundation in Fall 2011 that would fund a two-phase initiative: the first phase resulted in an organizational assessment for CHOW and the second phase resulted in this comprehensive strategic plan and resource development strategies to span a three-year period.

The central elements of this planning document are the proposed **vision, values and mission** statements for CHOW (which begin on page 6), the **eight strategic goals** for the organization over the 2012-15 period (descriptions begin on page 13 and the timelines appear as *Attachment A*), and the recommended **strategies for fundraising** (which are presented in *Attachment B*).

VALUES

CHOW's philosophy of harm reduction is based on the following eight institutional values.

- ❖ **Participant-centered:** listen to and honor peoples' needs
- ❖ **Non-judgmental:** care without judgment and with respect
- ❖ **Accessibility:** eliminate barriers to access services based on peoples' circumstances
- ❖ **The self-determination rights of each person:** respect and honor individual privacy, freedom, and choice
- ❖ **Empowerment:** provide opportunities for empowering participants to make positive changes in their health and well-being
- ❖ **Positive change:** support positive incremental change through options, not directives
- ❖ **Centrality of relationships:** recognize the importance of trust and relationships as the building blocks for successful service provision and positive change
- ❖ **Holistic and strength-based approach:** belief in the resiliencies of people to enhance the well-being of family and community

VISION

A new and ambitious vision statement for CHOW is the single most revealing step to describe the tremendous transformation that the organization is making. Unlike the values above, which when adopted by the organization are essentially “written in stone” and non-negotiable, a vision statement can definitely shift over time and reflect trends in the world, the industry, and the funding environment. RMA offers the following:

By 2015, CHOW will be considered one of the premier harm reduction organizations in the United States, recognized for its leadership and comprehensive approaches to:

promote the overall health and well-being of people and communities affected by drug use,

foster collaborative prevention strategies and reduce the risks of hepatitis B/C, HIV and overdose,

empower individuals and communities to make positive incremental change in health and well-being

eliminate the stigma of drug use through community education and outreach, and

advocate on behalf of people and families whose quality of life has been disrupted by the broader impacts of drug use.

MISSION

With the values as stated above and the vision statement defining an ambitious horizon that CHOW aspires to reach over the next three years, it is logical to rework and greatly expand CHOW’s mission statement.

Here is the previous mission statement and a new mission statement which was recently considered and adopted by the CHOW board of directors:

PREVIOUS MISSION STATEMENT:

The Community Health Outreach Work (CHOW) Project works to prevent the transmission of HIV/AIDS and other blood-borne pathogens among high-risk drug users, especially injection drug users, in Hawaii.

NEWLY APPROVED MISSION STATEMENT:

The Community Health Outreach Work (CHOW) Project is dedicated to serving individuals, families and communities adversely affected by drug use, especially people who inject drugs, through a participant-centered harm reduction approach. CHOW works to reduce drug-related harms such as but not limited to HIV, hepatitis B/C and overdose. CHOW supports the optimal health and well-being of people affected by drug use throughout the State of Hawaii.

This new mission statement will do much for external audiences to explain the “who and what” of CHOW but also the “why” in a way that is positive and proactive. For example:

CHOW no longer “works to prevent” something negative but now “**works to promote**” something positive;

The people who benefit from CHOW are not “drug users” but in fact **ordinary people all around us--“individuals, families, and communities”** affected by drug use;

The phrase “**harm reduction**” is very important to CHOW’s external messaging but is not familiar to many people outside our industry, and thus warrants definition literally within our mission statement;

The nature of how our original charter (i.e., focused on preventing the spread of HIV) is now **evolving into a much broader spectrum** of “harms” is also essential to understanding why CHOW exists and what value it brings to a much larger population;

Our previous, specific focus on people who inject drugs can now be opened up to include a much wider array of **drug-related behaviors**, depending on where our needs assessments dictate CHOW should direct its attention and where funding is attainable;

Our strategic goal to work on **eliminating the stigma around drug users** must necessarily begin within CHOW’s own communications, which includes moving beyond simply the “user” to the interconnected sphere of families and communities who are affected and who share the rewards of harm reduction; and

Describing the populations that CHOW serves as **people first** (i.e., “people who inject drugs”) follows is the same thoughtful word choice that the disability community continues to reinforce, i.e., not referring to “a disabled person” but “a person with a disability.” The distinction is that *the person is first and foremost a person*, with his or her involvement with drugs a secondary descriptor of a current behavior.

CURRENT PROGRAM PROFILE

Syringe exchange program - Historically CHOW has been a statewide HIV, and viral hepatitis prevention organization working with people who are active drug users. The organization has been dedicated to providing client-centered risk reduction services, health education and referral services to keep people from contracting or passing on HIV, STDs and hepatitis B and C. CHOW has provided a wide range of services that are free and anonymous that includes:

- One-for-one syringe exchange
- Safe sex supplies such as condoms
- Referrals to drug treatment centers
- Payment for methadone treatment for people who qualify
- HIV and hepatitis C counseling, testing and referral
- Education on prevention and reducing the risks of getting HIV, STDs and hepatitis
- Referrals to other community agencies

Over the past decade or so, the medical issues facing people who inject drugs have changed to where only about 3-5% of the CHOW participants have HIV/AIDS while 60-80% of the participants have hepatitis C. The national funding picture for HIV/AIDS is changing and is decreasing because HIV/AIDS is being viewed almost as a chronic disease that is treatable and the funding that is available is going to larger metropolitan areas within the United States that have more serious issues and larger numbers. Ironically, the success that has been experienced in Hawaii seems to be working against continued funding.

SITUATIONAL ANALYSIS

Because this strategic planning process began with an in-depth organizational assessment, much of this document relies on the findings, analysis and recommendations of that January 2012 report. In summary, CHOW currently exists in the following transitional stage:

A board that has been small and needs to double in size in 2012 and again in 2013, then be sustained at the optimum size of 12-15 through continuous recruitment and succession planning (i.e., staggered terms and a pool of ready candidates);

Board engagement that needs to shift dramatically toward the board supporting fundraising and outreach work in addition to focusing on a range of issues through a committee structure;

A staff that is dedicated and highly engaged, although the outreach workers are not equipped with completely consistent resources and measureable performance standards, and infrastructure systems such as job descriptions and professional development need to be implemented along with a mentoring approach that will enhance CHOW's ability to ensure and sustain its staff capacity for years to come;

A program delivery process that has focused closely on reducing the risk of HIV and needs to be adjusted and expanded to more comprehensively address the growing incidence of hepatitis B/C as well as more of the health/wellness challenges with sex workers and people who are homeless or only marginally housed, all toward an ultimate goal to reach a larger span of non-injection drug users as well as serve the families and communities who are adversely affected by a range of drug behaviors;

A funding picture which has historically been centered on one grant which will be decreased by \$120,000 in mid-2013, which highlights the need for a defined, diverse fundraising strategy;

A reputation for effectiveness within certain defined audiences, i.e., excellent relations with law enforcement, with its state funders, and with some other human service nonprofit organizations; but also

An awareness profile with the public that has been intentionally very low due to the controversial nature of syringe exchange programs and a lack of understanding of (or appreciation for) the harm reduction approach, not to mention the overall stigma of people who use drugs.

SWOT AND INTERPRETATION OF FINDINGS

STRENGTHS

History and track record of the organization;

Effective programs with extremely committed outreach and office staff;

Longevity of the staff (from 6-20 years) and the fact that many of the staff has personal experiences with the issue is a tremendous advantage in their ability to relate and develop relationships of trust with the participants;

Consistent funding source for 20 years;

Syringe Exchange Oversight Committee meets quarterly to review effectiveness of programs and is comprised of important stakeholders in Hawaii;

Annual research project gathers and analyzes data on the effectiveness of SEP and provides a data warehouse for funding and other purposes;

Quality **board members** in Lorraine Marais as board president, with the positive momentum of new members and ongoing recruitment;

Solid relationships with the **police departments** and other health care providers on the islands;

Financial and billing systems are in place; and

Excellent employment **benefit package** that exceeds 30% of compensation.

WEAKNESSES

The weaknesses of the CHOW generally relate to its lack of congruent systems and infrastructure, leadership training, diversified funding, and board development.

The organization has had single source funding since the birth of the organization. This is a great asset however; it leaves the organization **vulnerable** with an \$120,000 reduction of funding for CHOW in the summer of 2013;

The board members are very **committed and passionate** about the organization but the board does not yet have a clear understanding of their roles and responsibilities as board members of CHOW. In addition the size of the board, currently at eight, is still too small and needs to be expanded with additional skills, talents and contacts.

Although the staff is generally highly committed, professional, and competent, there are considerable **training needs** around mental health issues, public relations, computer skills, and other additional areas that need to be developed;

Challenges with shipping and maintaining adequate supply inventory on neighboring islands;

CHOW was established as an HIV prevention agency and yet HIV is very low on the list of priorities for CHOW participants;

Internal and governance documents are not in place or need updating such as: personnel policies, by-laws, staff and board job descriptions, and “H” election forms.

Staff has recently been given bonuses although **salaries generally are low**--there is a need for salary survey and adjustments based on an standardized evaluation process;

Although the longevity of the staff is a significant advantage, **the staff is aging**, with six out of seven of the outreach workers over 50 years old and some are in their 60s. There is need for a succession plan for the next five years as well as training practices for prospective new staff members;

The **visibility and public relations** of CHOW are minimal at a time where low visibility works against the organization’s ability to recruit new board members, raise funds, do advocacy and policy change and “position” itself in the community;

CHOW seems to be operating on a **tactical rather than strategic** basis, an indicator of the past lack of leadership within the organization.

OPPORTUNITIES

A small percentage of the participants are involved with HIV/AIDS but the overwhelmingly number of participants have **hepatitis C**, thus the organization must respond by shifting its focus;

CHOW should not continue **focusing on active injection drug users alone** but broaden its perspective to all drug users (and perhaps even other populations);

Having a **fixed site location** in Honolulu to provide programs, services and a place for CHOW participants to call home (as identified by staff during a staff retreat in November 2011 and other primary stakeholders);

Hiring **part-time social workers** for support groups, advocacy and intervention with governmental agencies and other services;

Diversified funding by other public and private agencies and foundations;

Working with people as they **exit the penal system** into the community;

Increasing marketing **and public relations** and develop academic/medical as well as consumer content to illustrate CHOW’s work and its impact; and

Address drug-related stigma through advocacy, policy and systems change.

THREATS

Generally the threats in a SWOT analysis are completely external, but RMA would also emphasize a few of the internal threats that impact the overall ability of the organization to execute:

CHOW will be **losing \$120,000** on July 1, 2013;

As CHOW becomes more public and “comes out of the closet,” there is a chance of **backlash** with the community, neighbors, fundamental churches and businesses;

Economy will continue to decline with corresponding **cuts in government** and private funding sources; and

Stigma attached to the profile of the target population being active drug users prevents community participation and hinders CHOW’s ability to attain more and appropriate board members.

IMPLICATIONS OF THE SWOT FINDINGS

The organization had a considerable amount of strengths and assets in its long history. During the past 20 years of service, CHOW has provided services to thousands of individuals who desperately needed the harm-reduction approach and products in a non-judgmental manner. The staff brings extensive experience, background and skill to the field and has been with the organization for long periods of time, all of which create continuity and trust with the participants. Given the leadership issues with the staff and board, Heather and Lorraine (as board president) have provided stability, skills and direction to CHOW that has been critically needed. A key stakeholder is the chief of STD/AIDS Prevention funding with the Hawaii Department of Health, and this is an incredible strength and opportunity to the organization.

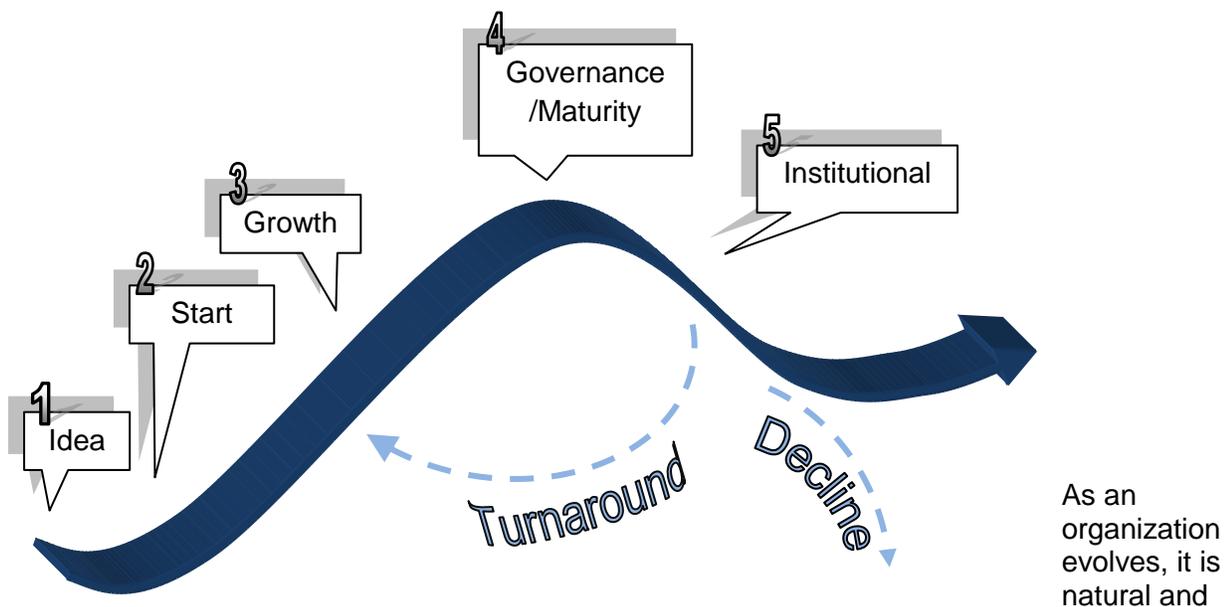
The weaknesses and challenges of CHOW are less significant than when RMA delivered its organization assessment, but still cannot be overlooked during this transition time. The board of directors is still too small (although the board has four newly elected members) and needs to play a stronger strategic role in leading or shaping the organization’s future. Some of the internal infrastructure pieces need to be enhanced in the areas of the human resources, legal (including by-laws and “H” election forms), fundraising, marketing and public relations plans.

The opportunities for CHOW surfaces with the impending reduction of a percentage of its funding next summer (July 2013) that creates an opportunity for CHOW to re-create and reposition itself. This could take place both with its programs and services it provides to participants and in the reputation, credibility, and visibility of the organization.

The threats will continue to include the uncertain economy and the organizational complacency to simply reduce programs and services. If the board of directors does not play a strong leadership and governance role--and hire a permanent executive director--the organization is at risk of losing momentum and passion.

ORGANIZATIONAL LIFE CYCLE

Organizations, like individuals, go through life cycles, and at different points during this evolution, different kinds of people, systems, and structures are appropriate.



necessary that the composition of the board of directors should change, the balance between leadership and management evolve, the qualities and job descriptions of the executive director/CEO shift, and other factors alter to match the life cycle and the strategic direction of the organization.

CHOW is in many ways at a classic crossroads in its evolution. For much of the history of the organization, when CHOW was going through its start-up, growth and maturity stages, it has had only three executive directors. CHOW is today operating with an interim executive director. This has triggered the proactive vision of the CHOW board to engage in a new direction with support from the Hawaii Community Foundation.

Life cycle evolution issues inform this strategic plan. Today, for example, the board is slowly growing and building its capacity to bring about change. The board needs to continue to expand to reflect greater diversity, skills, community contacts, and wealth that is necessary to take the organization to the next level. The original constituency having HIV/AIDS has changed to hepatitis C and the programs and business model of the organization needs to reflect these changes (as reflected in the new mission statement).

FACTORS AND KEY QUESTIONS

Given that CHOW is in a critical stage of its evolution--with substantial strengths to draw upon and an encouraging horizon of potential opportunities but also some system and infrastructure weaknesses as well as external threats, particularly around funding--there are clearly "moving pieces" that will directly affect its ability to survive and thrive over the next three years.

CHOW's original charter was to reduce the spread of HIV, which naturally dictated a program centered on syringe exchange, **balanced** with the clear shift that has occurred in demographics and health status (primarily hepatitis B/C) of people whose lives are affected by drugs through a variety of drug-related behaviors;

The relationship-based focus on the individual person **balanced** with the comprehensive approach of harm reduction that strives to serve not just a person but the family and community affected by the person's drug behaviors;

The small and highly technical expertise of the CHOW board which has served primarily in an oversight role, **balanced** with a substantially larger board that draws more upon a range of medical and non-medical community resources (i.e., banking, public relations, education, corporate) in a much more engaged model to support both outreach as well as fundraising;

The structure and culture of CHOW as being operational and tactical in a management focus **balanced** with the need now to make strategic decisions from a perspective of leadership, a change that involves both board and staff and will thrust people out of their comfortable default styles and roles;

The reliance on a dedicated but fairly autonomous team of outreach workers **balanced** with these same talents, passions and connections being delivered in a framework that places more emphasis on consistent processes and protocols that better "institutionalizes" the work CHOW does so that it is better positioned to be sustainable through future demographic and health trends, funding changes and an aging workforce;

The necessary shift that brings the organization out of its quiet, behind-the-scenes existence with support primarily from one funder **balanced** with a concerted effort to "go public" with its work, its values, and its results, a move that brings some inherent risk as well as great potential reward to address drug-related stigma over time.

Thus the decision-making framework that formed CHOW's strategic goals has included these questions:

Are the goals and objectives being appropriately defined in a proper balance between strategic and tactical perspectives?

Have factors that made CHOW a success in its first 20 years being preserved and maximized?

Can CHOW's transition toward a broader program mix with a larger staff be supported by a more diversified and therefore more sustainable funding stream?

Meanwhile, is the organization doing enough in these 2012-15 goals to evolve as the world around it is now dictating?

How will various new, additional, or different goals and objectives require different infrastructure (literal and figurative), different kinds of staff skills, a different board culture, etc.?

STRATEGIC GOALS, 2012-15

The following goals are based on findings and recommendations in RMA’s organizational assessment, incorporates notes from the CHOW Board’s January 2012 retreat, and have been developed in conjunction with interim Executive Director and Board Chair.

The eight goals are generally divided between actions which reasonably can be taken today and those which necessarily require more resources—time, money, people. Goal 5, Expand and Engage Board, is unique in that it is not resource-defined.

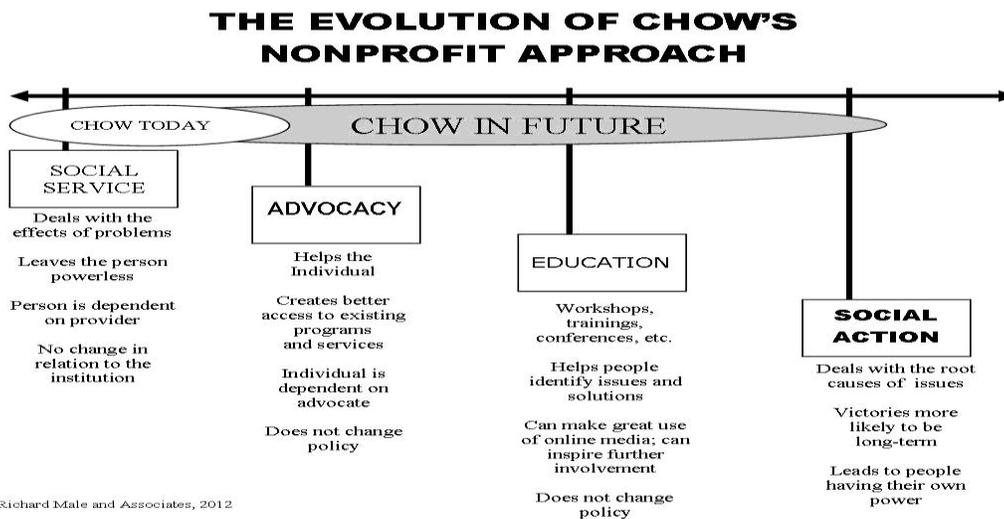
Virtually every goal is related in some fashion to another, i.e., staff capacity is an important element of each endeavor but staff issues are combined together in Goal 6.

Each of the eight goals appears with objectives and proposed timelines in Attachment A.

A. EVOLVED THE PROGRAM PROFILE

The first four goals of this plan are the essence of how CHOW delivers on its mission—the program areas of harm reduction through syringe exchange and other tactics, more evaluative research and a more effective method to distributing this data to effect real progress, a strong voice to apply CHOW’s unique experience and expertise to public policy decisions, and more strongly participating in a leadership role on statewide coalitions related to people who have drug behaviors and the families and communities thus affected.

One of the ways to view the philosophical shift that CHOW needs to make is to consider the continuum of program approaches employed by most organizations in the nonprofit sector. The diagram on the next page illustrates the potential for CHOW to move from its position in the SOCIAL SERVICE approach toward a much broader, comprehensive position that spans both ADVOCACY (some of which does exist in CHOW’s work today) as well as EDUCATION and toward SOCIAL ACTION and social justice.



GOAL 1 - ENSURED STRATEGIC, EFFECTIVE DIRECT SERVICE

Overview: CHOW's original mission to reduce the infection of HIV has naturally been **superseded by two factors:** the data showing that new HIV infection rates in Hawaii are generally down, along with the 2010 estimate of just 3% of CHOW participants living with HIV; and the reallocation of the funding that was originally focusing on HIV. Meanwhile, about 70% of the population CHOW currently serves is estimated to be hepatitis C-positive. Thus CHOW has the opportunity to expand its target population as well as add harm reduction services beyond the increasingly narrow scope of HIV infection. CHOW can also expand its scope of service beyond injection drug users toward serving people with a wider range of drug behaviors, and in doing so, also expand its focus on an individual toward a more **comprehensive family- and community-based perspective.**

The increasing incidence of both mental illness and homelessness in the population of people with drug behaviors can affect CHOW's evolving service profile—not that CHOW will directly address such issues *per se* but that through collaborative relationships and information-sharing will be able to design its own services in the future from a more broadly based perspective.

Objectives within current funding

- 1.1 Incorporated best practices for syringe exchange
- 1.2 Expanded overdose prevention and response program
- 1.3 Increased viral hepatitis services
- 1.4 Conducted education and training for external service providers and stakeholders on harm reduction and drug-related stigma
- 1.5 Formalized network/referrals on comprehensive services (mental illness, homelessness)

Objectives requiring additional funding/capacity

- 1.6 Conducted a needs assessment of people currently being served
- 1.7 Conducted a needs assessment of the wider community affected by drug use
- 1.8 Reached an expanded population:
 - People who inject drugs
 - People who do not inject but have other drug behaviors
 - People who abuse prescription drugs
 - People who are sex workers to support drug behaviors
 - Family members of people with drug behaviors
- 1.9 Maintained methadone treatment on-demand (after current funding ended)

GOAL 1 -- ENSURED STRATEGIC, EFFECTIVE DIRECT SERVICE

TASK / ACTIVITY	LEAD	START	PROGRESS
<u>Objectives with current funding</u>			
1.1 Incorporated best practices for needle exchange	Program Director	August	
1.2 Expanded overdose prevention and response protocols	Program Director	September	
1.3 Increased viral hepatitis services	Program Director, Staff	October	
1.4 Conducted education and training for external service providers and stakeholders on harm reduction and drug-related stigma	Heather, Program Director	2013	
1.5 Formalized network/referrals on comprehensive services (mental illness, homelessness)	Heather, Program Director	2013	
<u>Objectives requiring additional funding/capacity</u>			
1.6 Conducted a needs assessment of people currently being served		2013	
1.7 Conducted a needs assessment of wider community affected by drug use		2014	
1.8 Reached an expanded population:	Program Director, Staff		
* People who inject drugs		2012	
* People who do not inject but have other drug behaviors		2013	
* People who abuse prescription drugs		2013	
* People who are sex workers to support drug behaviors		2012	
* Family members of people with drug behaviors		2014	
1.9 Maintained methadone treatment on-demand (after current funding ended)		2013	

GOAL 2 - EXPANDED RESEARCH/PUBLICATION EFFORTS

Overview: A clear opportunity for CHOW to maximize its strengths, increase earned income, and garner a heightened awareness/reputation is through a more formal research and publication process. Rising up as a recognized resource for current and unique data, as well as making trend analyses and innovative approaches to harm reduction, will do much to help CHOW achieve its ambitious mission to be viewed as a **leading harm reduction agency** in the country.

CHOW has 20 years of syringe exchange data as a potential source for unique scholarship, publications, and education; thus we include in the objectives with current funding the two steps of (1) engaging one or more grad student(s) to review this body of data since 1993, and (2) determining the potential for this information to be packaged and distributed to those who are designing drug behavior treatments in other settings. In the future, with additional funding, CHOW would like to formally create a **research department** that would have the luxury of focusing year-round on both better evaluative data collection going forward but also the value of the historical data that CHOW has, all with an eye on positioning CHOW as a leader in its industry but also as a **potential contractor for funded projects**.

Objectives within current funding

- 2.1 Included outcome-based program evaluation
- 2.2 Updated existing survey tool to incorporate new indicators based on strategic plan
- 2.3 Included formative and summative evaluation components to improve programs
- 2.4 Formed partnerships to create research/analysis opportunities for graduate-level students:
Hawaii Pacific University
University of Hawaii
- 2.5 Examined existing data to determine applicable trends, tangible use(s) of data
- 2.6 Prepared CHOW research for publication and submitted abstracts to relevant conferences

Objectives requiring additional funding/capacity

- 2.7 Identified opportunities for new research in 2012-15 on a nationwide basis
- 2.8 Produced articles around trends in the industry, key research findings

GOAL 2 -- EXPANDED RESEARCH AND PUBLICATION EFFORTS

TASK / ACTIVITY	LEAD	START	PROGRESS
<u>Objectives with current funding</u>			
2.1 Included outcome-based program evaluation	Lorraine, Heather		
2.2 Updated survey tool to incorporate new indicators based on strategic plan	Lorraine, Heather		
2.3 Included formative and summative evaluation to improve programs	Lorraine, Heather		
2.4 Formed partnerships to create research/analysis opportunities for graduate-level students:			
* Hawaii Pacific University		2013	
* University of Hawaii		2013	
2.5 Examined existing data to determine applicable trends, tangible use(s)		2013	
2.6 Prepared CHOW research for publication and submitted abstracts to relevant conferences			
<u>Objectives requiring additional funding/capacity</u>			
2.7 Identify opportunities for new research in 2012-15 on a nationwide basis	Heather, Research Director	2015	
2.8 Publish articles on trends in industry, key research findings	Heather, Research Director	2015	

GOAL 3 – BUILT A STRONGER POLICY DEVELOPMENT AND ADVOCACY VOICE

Overview: In CHOW’s exciting evolution in the next three years, it is no longer going to be enough to quietly provide service—CHOW needs to make its philosophy heard in the decision rooms where policy gets formed. CHOW has the **experience**, and has the **expertise**; CHOW is on the street doing the work. CHOW has a **perspective** that government decision-makers need in order to not make funding or program decisions in a vacuum. The executive director and board members may also have to convince decision-makers that such counsel is worth their time.

This is the programmatic, or operational, version of Goal 8—which is specifically about external outreach, branding, and positioning of CHOW.

Objectives within current funding

- 3.1 Re-examined potential for “Good Samaritan” bill on overdose and use of Naloxone
- 3.2 Strengthened effectiveness of Oversight Committee on syringe exchange
- 3.3 Testified and wrote position papers on key issues related to CHOW’s mission
- 3.4 Drafted op-ed pieces for newspapers
- 3.5 Conducted outbound media relations to garner interviews, coverage
- 3.6 Explored potential for CHOW to register with an H-election
- 3.7 Became involved in national advocacy efforts related to hepatitis and harm reduction

Objectives requiring additional funding/capacity

- 3.8 Added staff person to focus on public policy
- 3.9 Scanned policy-change successes of other harm reduction agencies around U.S.
- 3.10 Designed lobbying campaign for non-traditional prevention, harm reduction, and treatment

GOAL 3 -- BUILT A STRONGER POLICY DEVELOPMENT AND ADVOCACY VOICE

TASK / ACTIVITY	LEAD	START	PROGRESS
<u>Objectives with current funding</u>			
3.1 Re-examined potential for "Good Samaritan" bill on overdosing	Heather, Board	2013	
3.2. Strengthened effectiveness of Oversight Committee on needle exchange	Heather, Program Director	2013	
3.3 Testified and wrote position papers on key issues related to CHOW's mission	Heather, Board	2013	
3.4 Drafted op-ed pieces for newspapers	Heather, Board	2013	
3.5 Conducted outbound media relations to garner interviews, coverage	Heather	2013	
3.6 Explored potential for CHOW to register with an H-election	Board	2013	
3.7 Became involved in national advocacy efforts related to hepatitis and harm reduction	Heather	2015	
<u>Objectives requiring additional funding/capacity</u>			
3.8 Added staff person to focus on public policy	Heather	2014	
3.9 Scanned policy-change successes of other harm reduction agencies around U.S.	Heather, Public Policy Director	2014	
3.10 Designed lobbying campaign for non-traditional prevention, harm reduction, and treatment	Heather, Public Policy Director	2014	

GOAL 4 - EXPANDED COLLABORATION AND PARTNERSHIPS

Overview: Thanks in large part to the relationships that Heather Lusk brings to CHOW and the fact that CHOW has been in existence for two decades, sharing information and working informally and cooperatively with other organizations is ongoing. This kind of lateral involvement through the substance abuse and social service communities in Hawaii should be expanded, and in some cases, formalized. Where possible, CHOW staff or a board member should serve in a leadership role in coalition or roundtable groups. In cases where CHOW's dedication to harm reduction would make a leadership role illogical, it is still valuable to establish a presence and continue to reinforce CHOW's work in the broader industry. Depending on the strength of the network of the individual who is recruited as the CHOW program director, he/she will be expected to broaden the reach and influence of CHOW by participating in a number of groups.

There is also an opportunity for CHOW to drive this process rather than ride along, that is, to convene a quarterly session or periodic public/private/nonprofit meeting on issues most closely related to CHOW's values and challenges. Such an undertaking would build awareness of CHOW, help lower the barriers or silos that may exist between different entities, and elevate CHOW as a vocal industry leader rather than merely a quiet player.

Objectives within current funding

- 4.1 Reviewed/improved roles in appropriate coalitions:
 - Substance Abuse Coalition
 - Partners in Care Homeless Coalition
 - Hawaii HIV Planning Group
- 4.2 Formalized connections with medical providers who practice CHOW's values
- 4.3 Formalized ties and information-sharing with law enforcement

Objectives requiring additional funding/capacity

- 4.4 Made strategic alliances and formed appropriate coalitions (based on populations in Goal 1)
- 4.5 Formalized ties and information-sharing with other human service nonprofits
- 4.6 Convened public/private/nonprofit conference(s) on relevant harm reduction topics

GOAL 4 -- EXPANDED COLLABORATION AND PARTNERSHIPS

TASK / ACTIVITY	LEAD	START	PROGRESS
<u>Objectives with current funding</u>			
4.1 Reviewed/improved role in appropriate coalitions:	Program Director, Heather	September	
* Substance Abuse Coalition			
* Partners in Care Homeless Coalition			
* Hawaii HIV Planning Group			
4.2 Formalized connections with medical providers who practice CHOW's values	Program Director, Heather	October	
4.3 Formalized ties and information-sharing with law enforcement	Program Director, Heather	November	
<u>Objectives requiring additional funding/capacity</u>			
4.4 Made strategic alliances and formed coalitions (based on populations in Goal 1)		2013	
4.5 Formalized ties and information-sharing with human service nonprofits		2013	
4.6 Convened public/private/nonprofit conference(s) on relevant harm reduction topics	Heather, Program Director	2014	

B. ENSURED INFRASTRUCTURE AND SYSTEMS

The following four goals of this strategic plan, Goals 4-8, are based on the related, supporting, structural actions that must be taken to support the attainment of Goals 1-4 above. These goals include building a stronger board and staff, raising money to continue to build and sustain CHOW, and external messaging.

GOAL 5 –EXPANDED AND ENGAGED THE BOARD

As an essential element to CHOW's success, the board of directors will evolve in the following areas:

Board governance: Documentation for the organization needs to be updated. The bylaws need to include issues around a constituent's quorum, size of the board of directors, email allowing notices of meetings, an indemnification clause, and other issues. The board needs to consider adopting an IRS- "H" election to define its allowable public policy/advocacy expenditures. The board does have Directors and Officers liability insurance and that should be maintained.

Board size: The size of the board needs to be dramatically increased. CHOW simply does not have the quantity and strategic mix within the board to successfully place a strong leadership role. During the next 12-18 months, the serious recruitment effort needs to be continued to bring people on who have skills in areas such as public relations, media and marketing, legal, medical, and people who have access to large numbers of people and wealth such as a minister from a leading faith-based organization or members of Rotary Clubs.

Board recruitment: Definition of needs based on a **board grid** and with a premise of inclusion and maximizing diversity in every sense of the word (age, gender, background, related experience, cultural/social traditions, etc.);

An ongoing, **consistent "radar"** for likely candidates in these identified areas;

A smooth, defined **process** for referrals, introductions, nominations, election, and orientation;

Identifying likely candidates and making initial introductions together in a **small group**, rather than one at a time;

Identifying one person on the CHOW board who pays attention to "the care and feeding of the board," i.e., how well people are **acquainted** and how much time they have to spend to form social/personal connections in addition to the mission-related ones; also paying attention to how well board members are **educated** on the overall workings of the organization;

Maintaining one eye on the ever-evolving board terms so that even if all directors fulfill their elected terms, there is a staggered set of terms so that the board gains five new directors for every five that roll off; and, in the spirit of **succession planning**, establishing a back-up plan with an existing pool of potential candidates at least identified for "if or when" medical issues, family obligations, retirement, relocation, etc. bring terms to an end unexpectedly; and

With a right-sized board, CHOW will greatly benefit from a **committee structure**. The following committees should be formed out of both sitting board members as well as other friends and stakeholders (this strategy essentially creates a "farm team" for future nomination and election to the board). A current board member would serve as chair and each committee would have 3-4 members:

Public Policy

Communications/Outreach
Fundraising, including earned income
Finance
Program
Board Development

For better board engagement, the foundation will be training. Many well-intentioned people stand for election on nonprofit boards without having served on a board before, or, for that matter, without having seen a high-functioning board in action. Understanding the customary responsibilities of a nonprofit board, which necessarily includes fundraising and support with outreach and opening doors to new networks, will help individual members move toward a role that is both needed by CHOW as well as the right fit for the person's abilities, connections, and time.

Both the expansion and much stronger engagement of the CHOW board represent a major climate shift for the organization, and one that cannot be expected to move altogether smoothly. The "new" CHOW is not necessarily going to be completely welcoming to all longtime board members (or even staff, for that matter), and some turnover is virtually inevitable.

Objectives within current funding

- 5.1 Recruited to optimum size with rolling terms of election to maintain/sustain
- 5.2 Identified and recruited to identified needs, talents, networks
- 5.3 Developed comprehensive new board member orientation
- 5.4 Re-defined board expectations, roles and responsibilities
- 5.5 Involved and engaged the board in fundraising
- 5.6 Established committee structure
- 5.7 Conducted ongoing training as part of regular meetings
- 5.8 Conducted annual retreat(s)
- 5.9 Designed a formal board development plan, including succession
- 5.10 Reviewed and updated by-laws to reflect elements/impacts of this strategic plan

B. ENSURED INFRASTRUCTURE AND SYSTEMS**GOAL 5 -- EXPANDED AND ENGAGED THE BOARD**

TASK / ACTIVITY	LEAD	START	PROGRESS
<u>Objectives with current funding</u>			
5.1 Recruited to optimum size with rolling terms of election to maintain/sustain	Lorraine, Board	Ongoing	
5.2 Identified and recruited to needs, talents, networks	Lorraine, Board	Ongoing	
5.3 Developed comprehensive new board member orientation	Lorraine, Heather	August	
5.4 Re-defined board expectations, roles and responsibilities	Lorraine, Heather	September	
5.5 Involved and engaged the board in fundraising	Lorraine, Heather	October	
5.6 Established committee structure	Lorraine	2013	
5.7 Conducted ongoing training as part of regular meetings	Heather	2013	
5.8 Conducted annual retreat(s)	All	2013	
5.9 Designed a formal board development plan, including succession	Lorraine, Board	2013	
5.10 Reviewed and updated by-laws to reflect elements/impacts of this strategic plan	Board	2013	

GOAL 6 - BUILT STAFF / DELIVERY CAPACITY

Overview: CHOW's dedicated staff is the key to its success today and will only continue to grow in importance in the years ahead. Between now and the end of 2015, the current employment of 10 people is intended to grow to 17, plus the potential of three unpaid professionals serving in an intern role for the departments of research, development, and public policy. *Current and proposed organizational charts appear in Attachment C.*

Objectives within current funding

- 6.1 Hired a Program Director
- 6.2 Updated staff policies and procedures
- 6.3 Refined/updated role and job descriptions of all positions
- 6.4 Created a professional development plan for each employee
- 6.5 Developed and expanded staff performance benchmarks and personnel evaluation
- 6.6 Developed succession planning for all positions

Objectives requiring additional funding/capacity

- 6.7 Set up research department within CHOW
- 6.8 Established research protocols and annual goals
- 6.9 Added new staff positions, either on contract, part- or full-time:
 - Fundraising professional
 - Hepatitis case manager
 - Research director
 - Social worker
 - Public policy director
 - Nurse case manager
- 6.10 Secured fixed site in Honolulu

GOAL 6 -- BUILT STAFF / DELIVERY CAPACITY

TASK / ACTIVITY	LEAD	RESOURCES	START	PROGRESS
<u>Objectives with current funding</u>				
6.1 Hired a Program Director	Heather		August	
6.2 Updated staff policies and procedures	Heather	Outside HR expertise	October	
6.3 Refined/updated roles and job descriptions for all positions	Heather	Outside HR expertise	November	
6.4 Created a professional development plan for each employee	Heather, Program Director	Outside HR expertise	December	
6.5 Developed and expanded staff performance benchmarks and personnel evaluation	Heather		2013	
6.6 Developed succession planning for all positions			2014	
<u>Objectives requiring additional funding/capacity</u>				
6.7 Set up research department within CHOW	Heather		2015	
6.8 Establish research protocols and annual goals	Heather, Research Director		2015	
6.9 Added new staff positions, either on contract or part- or full-time:				
* Fundraising professional			2013	
* Hepatitis case manager			2013	
* Research director			2015	
* Social worker			2014	
* Public policy director			2014	
* Nurse case manager			2015	
6.10 Secure fixed site in Honolulu	Board, Heather		2013	

GOAL 7 - ENSURED FINANCIAL VIABILITY

Overview: CHOW's vulnerability at this time is due to a lack of a diversified approach. Public sector support over the next 3-5 years should decrease from virtually 100% to around 75% of CHOW's annual revenue, and there is a great need to expand on other approaches: **corporate support and sponsorships; foundation grants; individual donors; earned income;** and an **annual board campaign**.

To evolve from a single-source of support to a more balanced one from 5-7 strategies, probably the most critical shift in organizational culture is the encouragement of the board to **support fundraising in a variety of appropriate ways**. Roles are varied and can be designed to accommodate a range of personalities and connections: community "ambassador," attending meetings with funders, participating in community and industry coalitions, giving presentations to civic clubs and other groups, and so on.

Meanwhile, on the staffing side, there is also a great need for a fundraising professional to assist with designing individual donor cultivation process. With regard to earned income, research contracts over time could be lucrative (2015 and beyond) although CHOW could be competing for work with academic institutions; it is far less likely that CHOW would face market competition for its consumer content and presentations relating to reducing the stigma of people who have drug-related behaviors.

Objectives within current funding

- 7.1 Designed an operational plan for fundraising and resource development
- 7.2 Set and implemented Board fundraising goals and expectations
- 7.3 Implemented strategies designed for each potential source:
 - Foundations
 - Corporate sponsors
- 7.4 Explored new avenues for public funding, including strategic partnerships
- 7.5 Maximized United Way campaign

Objectives requiring additional funding/capacity

- 7.6 Developed earned income strategies through:
 - Workshops
 - Curricula for youth programs and schools
 - Publications, including cartoon book (consumer) and research (academic/medical)
- 7.7 Deepened and formalized process of individual donor cultivation

GOAL 7 -- ENSURED FINANCIAL VIABILITY

TASK / ACTIVITY	LEAD	START	PROGRESS
<u>Objectives with current funding</u>			
7.1 Designed an operational plan for fundraising and resource development	Heather, contract fundraiser (later)	September	
7.2 Set and implemented Board fundraising goals and expectations	Lorraine, Heather	September	
7.3 Implemented strategies designed for each potential source:	Heather, Board, contract fundraiser (later)		
* Foundations		October	
* Corporate sponsors		November	
7.4 Explored new avenues for public funding, including strategic partnerships	Heather, Board member	August	
7.5 Maximized United Way campaign	Lorraine, Board	Ongoing	
<u>Objectives requiring additional funding/capacity</u>			
7.6 Developed earned income strategies through:	Heather, Program Director		
* Workshops		2014	
* Curricula for youth programs and schools	Research Director	2015	
* Publications, including cartoon book (consumer) and research (academic/medical)			
7.7. Deepened and formalized process of individual donor cultivation	Fundraising professional	2013	

GOAL 8 - STRENGTHENED VISIBILITY / POSITIONING

Overview: It is a significant transition for CHOW to consciously evolve from a well-kept secret to a publically recognized nonprofit organization. This evolution will require numerous kinds of outbound communications, from speeches to Rotary Clubs to local media interviews to active participation (including leadership roles) on community coalitions.

The benefits of this transition can be significant. As the board and staff works to develop a donor cultivation system for individual gifts, the stronger brand awareness will be critical. The same will be true for future corporate sponsors and foundation grants. *More discussion of fundraising strategies appears in Attachment B.*

Before CHOW is ready to emerge into the public awareness in a far greater realm than it has been, clarity of messaging is needed. For one, there is not understanding of “harm reduction,” although once explained, it is a very proactive approach in the context of being ready to offer solutions for better self-care and health if and when people are ready. Secondly, in both this and the public policy-related goal, there is the essential but very daunting need to **reduce the stigma of drug use and users**. Reversing a stigma such as this can take a generation or more of time—and it is obviously never going to be completely successful, given the disasterous effect that drug behaviors inarguably have on people, families, neighborhoods, and entire communities. The challenge is to change the perspective of *who the people who use drugs* are: they are our neighbors, our employees, our friends. They are much more similar to “you and me” than they are different. They do not neatly fall into neat stereotypical categories of gender, age, ethnicity, or background. The messaging and perception of organizations such as CHOW is to determine how to **make drug behaviors perceived to be just as “non-discriminatory” as alcohol behaviors**. There are important distinctions to be made, of course—primarily that alcohol can legally be obtained by people over age 21—but the model of understanding and accepting people who use drugs should be modeled after the more benign and empathetic way that our society views people who abuse alcohol.

Objectives within current funding

- 8.1 Identified key messages and train board and staff
- 8.2 Built brand identity through marketing/public relations

Objectives requiring additional funding/capacity

- 8.3 Designed/implemented outbound media strategy
- 8.4 Launched public branding and awareness campaign
- 8.5 Created materials for board and staff to act as “ambassadors”
- 8.6 Built youth community outreach at secondary schools and college level

GOAL 8 -- STRENGTHENED VISIBILITY / POSITIONING

TASK / ACTIVITY	LEAD	RESOURCES	START	PROGRESS
<u>Objectives with current funding</u>				
8.1 Identified key messages and trained board and staff	Board, Heather		September	
8.2 Built brand identity through marketing/public relations	Board, Heather	Speeches, media	October	
<u>Objectives requiring additional funding/capacity</u>				
8.3 Designed/implemented outbound media strategy				
8.4 Launched public branding and awareness campaign	Heather, Board	Pro-bono creative agency	2013	
8.5 Created materials for board and staff to act as "ambassadors"	Program Director	Creative agency	2013	
8.6 Built youth community outreach at secondary schools and college level	Program Director		2014	

Appendix A - FUTURE RESOURCE DEVELOPMENT STRATEGIES

The financial standing of CHOW is vulnerable to the extent that it is not a diversified approach. Over the past 20 years, 100% of CHOW's operations have been funded by a single resource, the State of Hawaii Department of Health. Without the compelling need for, or effort toward, broadening and diversifying its funding, CHOW is particularly vulnerable today now that we have been notified that CHOW going to lose a portion of its \$1 million annual budget, or around \$120,000, in July 2013. CHOW must move toward an approach that continues to be based on public sector funding but that also **maximizes a range of smaller, but controllable, sources of revenue.**

- PRIVATE FOUNDATIONS:**
 CHOW has an existing relationship with the Hawaii Community Foundation, which funded organizational assessment strategic plan project. There are other foundations in Hawaii that would likely be interested CHOW in its current state, although the opportunities much wider foundation interest throughout the become greater as CHOW strengthens its research component and overall profile as a leader in both harm reduction as well as a larger approach of meeting the needs of people who use drugs and the communities affected by drug behaviors. RMA estimates that at least 10% of CHOW's annual budget by 2015 could be in the form of grants from private foundations around specific programs, projects and initiatives. Foundation dollars are the most likely source for CHOW's expanded program capacity, including the hiring of a social worker and nurse case worker as suggested in this plan.

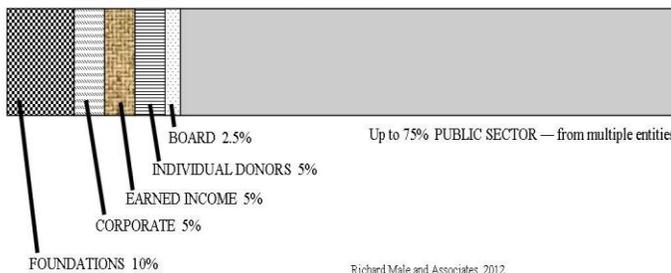
FROM SINGLE-SOURCE FUNDING TO A DIVERSIFIED APPROACH

CHOW'S FUNDING TODAY



this and

CHOW'S FUNDING in 3-5 YEARS



in for U.S.

Richard Male and Associates, 2012

The recommended approach is to have the Executive Director and the part-time development professional review the funding profiles of other foundations, both from a perspective of CHOW's work

today but also from a broader spectrum of collaborations/partnerships as outlined in this plan. Again, the opportunity probably lies in positioning CHOW as a resource to build the health and vibrancy of not just individuals but also their families and the communities where they live.

2. **CORPORATIONS** - This will not likely be a substantial source of funding for CHOW, although the marketing goals of some pharmaceutical companies might be a match for CHOW's work, and the financial services industry (particularly Hawaii banks) may be supportive as well from a community health perspective. CHOW recently received a line of credit from a new bank for \$50,000 and they have a banking executive on the board. Corporate dollars could grow to provide about 5% of CHOW's annual budget.

The recommended approach includes identifying leaders in the Hawaii business community who have a connection to CHOW's work and/or identifying Hawaii businesses who would be interested in raising their own public persona as an investor in the health and well-being of people living and working in the state. Some companies see supporting a specific nonprofit's work as a way to position themselves as a preferred employer. We all understand that the era of "corporate philanthropy" is all but dead, but the opportunities for a nonprofit organization to align itself with a business or corporate office along sales, marketing, employee recruitment/retention, or public relations interests is very real. To be fruitful, such connections must be long-term in nature, i.e., not merely a transaction or even a relationship per se, but a true partnership built on mutual goals.

3. **EARNED INCOME** - Over time, CHOW may well be able to derive earned income from its research as well as presentations and/or educational curricula for young people. CHOW staff are already being asked to speak at conferences and if they can get their research component going and publish some articles, this could turn into a revenue stream. At one time CHOW published a cartoon book dealing with addiction--an idea that may have merit to be re-launched, particularly if it could be delivered and sold online to school, churches, or other youth-focused organizations spanning a much broader area. Earned income could conceivably represent 5% of a future annual budget.

The recommended approach would be to form a board committee, chaired by a current board member but comprised of some research as well as marketing professionals, who could explore CHOW's strengths in terms of developing and packaging academic and/or consumer content and presentations relating to people who use drugs and the effects of this use in families and neighborhoods—all with a harm reduction and non-punitive point of view in keeping with CHOW's organizational values.

4. **BOARD OF DIRECTORS** - A larger and more broadly engaged board will necessarily require stronger orientation, training, and tools for providing community outreach. CHOW can begin today to set some expectations for board members to open up doors, act as ambassadors, and make

financial contributions themselves. This will never been a significant source of funding, but it could be 2.5% of a future annual budget.

The recommended approach would start with board recruitment to a sustained, revolving 15-17 person level and certainly include individuals who are “positioned” well in the community including a minister or two of a large church, members of Rotary clubs, small business owners, and corporate executives. Some nonprofits make dramatic strides in visibility and credibility by aligning with a local “celebrity”—a successful entrepreneur, a local media figure, or a current or recent professional athlete being good examples.

5. **INDIVIDUAL DONORS-** Even in a challenging recession, 75% of the money given to nonprofits in this country comes from individuals (and another 8% come in the form of wills and bequests). CHOW can launch a more structured donor cultivation system by having staff and board members begin to speak as much as possible with church groups, community and civic clubs, and other supportive groups and organizations.

The recommended approach will be to set quarterly goals for public speaking, supported by outbound media as described in the strategic plan, and supporting the cultivation process through good data management. The key in communicating to potential donors is in understanding the philosophy of harm reduction as well as the potential to support families and neighborhoods. Over time it will pay off that this community outreach work has resulted in a mailing lists and develop an annual online + direct mail campaign to individual donors that have the capability of contributing up to \$1,000. This will grow over time but CHOW can reasonably expect around 1% the first year that could, with cultivation, grow over several years to about 5% of a future annual budget.

6. **GOVERNMENT-** Public sector funding will likely continue to be the mainstay of the organization, representing up to 75% of an annual budget. The key here is to move beyond the State of Hawaii Department of Health’s traditional HIV/AIDS funding stream to include Hepatitis A, B and C in addition to providing a variety of social services, nursing care, advocacy, and related research. As CHOW evolves away from the its historically narrow focus on needle users and more inclusive to with people who are addicted this could open up additional doors both locally and nationally, from the City of Honolulu to federal agencies like SAMSHA, the Center for Disease Control (Atlanta) and others.

The recommended approach will be to create the opportunity for the Executive Director to focus on public sector relationships while the development person would focus on the supporting infrastructure and administration of the new, diversified strategies as the earlier diagram suggested. As CHOW grows and adds its public policy director, the visibility of the organization throughout the public sector will grow and can only support opportunities to discuss how CHOW can meet a wider range of agencies’ interests in the areas of public health, youth/family services, and community development.

The part-time, contract, or (eventual) full-time development person would play three roles:

- A. **Develop** all of the “backroom” activities mentioned above including developing the 12 month operational plan
- B. **Help** organize Heather’s time as it relates to fundraising and “positioning” of the organization
- C. **Work** with the board to motivate them and to get them to open up doors and act as ambassadors to the organization

Success in the implementation of this new diversified fundraising approach for CHOW will rely on three main components that need to be put in place:

1. **Staff and organizational commitment.**

CHOW must make a commitment to hire adequate staff, starting with the appointment of a permanent executive director, a strong program director, a development professional that is part-time or contract but that will evolve into a full-time position, and continuing with building in needed administrative help as the organization grows.

2. **Board support of broader, more diversified fundraising.**

- Opening up doors to potential donors and supporters as “ambassadors”
- Going on fundraising interviews with foundations
- Serving on coalitions and maximizing public sector connections
- A board fundraising committee to develop annual plans and milestones
- Focus on earned income opportunities, including research and content products
- Making an individual donation yearly

3. **Time.**

It is important to realize that making this important shift to diversify CHOW’s funding will take time to execute. Sometimes private foundations with whom CHOW already has a relationship can take 12-18 months before a check is received and sometimes it might take two or three tries before CHOW is successful. Individual donors might not make their first gift a significant amount and sometimes it might only be \$50. The key to donor cultivation is to maintain an appropriate stream of outbound data and stories of the positive difference that CHOW is making in the lives of Hawaii residents, their families, and the state as a whole. It will take at least three years, and likely more, to reach financial goals. Starting today, the development team (the executive director, the development professional, admin support and of course the board) can begin to develop approaches—planned giving, earned income, corporate partnerships—that will help lead to longer-term sustainable growth. On a yearly basis, CHOW intends to put in place resource development operational plans as part of its annual work plan, with expectations, roles/responsibilities, benchmarks and evaluation systems.