



Orillia Soldiers' Memorial Hospital Foundation

Strategic Plan

Laying the groundwork for our future

EXECUTIVE SUMMARY

Our blueprint for success over the next few years, the Foundation's Strategic Plan, was created under the thoughtful guidance and inspiration of the Foundation's Board of Directors and staff and aligns closely with the Hospital's Strategic Plan. The Foundation's strategic plan includes our newly-approved Mission, Vision and Values and outlines how we intend to turn our goals into reality.

MISSION, VISION & VALUES

MISSION

Suggested: To inspire investment in OSMH through fundraising, awareness and stewardship

Explanation: We narrowed it down to this mission statement during our SOAR (strengths, opportunities, aspirations & results) session with board members and hospital leadership. Encompassing not only fundraising, but awareness and stewardship in our Mission supports our key objectives of maximizing revenue, building awareness and inspiring a culture of philanthropy over the next few years.

VISION

Suggested: You can be the difference

Explanation: During our SOAR Session, almost everyone agreed that we like the current vision of *You can be the difference* and that it continues to reflect the Foundation's strategic vision. The short statement is impactful, and easy to use in all forms of marketing including our direct mail appeals, radio ads and print materials.

VALUES

Suggested: Gratitude, Respect, Integrity, Trust (GRIT)

By having four key values we feel our overall vision is more streamlined and marketable. We have dropped the values Passion & Appreciation, and replaced them with the word gratitude which we feel encompasses both. Appreciation is also now reflected in our Mission statement under Stewardship. There is also a belief that having passion for the efforts of the Hospital and Foundation should be intrinsic to all efforts made. We also replaced Accountability with Trust. As accountability should be a standard operation. Having four values that aligns with the hospital's strategic plan.

KEY OBJECTIVES

1. Maximizing Revenue in support of OSMH's needs and Priorities
2. Building Awareness that results in Financial Support
3. Building a Culture of Philanthropy

CORE INITIATIVES IN SUPPORT OF OUR KEY OBJECTIVES

MAXIMIZING REVENUE IN SUPPORT OF OSMH'S NEEDS AND PRIORITIES

- Secure and renew multi-year leadership-level gifts and pledges from major donors (\$5,000+) with an interest in and affinity toward OSMH
- Research to identify and expand donor pipeline and gain better understanding of potential donor segments in our region
- Qualify donor/prospect pipeline based on link, interest and ability (LIA) to support OSMH
- Create strategy to engage seasonal residents
- Integrate leadership giving with planned giving by continuing to have discussion about Planned Giving with Major Donors.
- Strengthen the Planned Giving program, by creating a year to year plan outlining specific strategies to increase awareness encourage donor visits, host seminars, introduce new mailings, strengthen marketing & promotion and outreach to allied professionals.
- Expand and diversify our annual fund programs to renew and acquire donors and secure overall increased investment
- Create strategy to transition mid-level annual giving donors to Major Gifts
- Enhance effectiveness of our signature events, strategically grow third party events and community engagement programs to show increased revenue
- Ensure dedicated resources to support enhanced development of fundraising programs through efficiencies, learning and growth opportunities.

BUILDING AWARENESS THAT RESULTS IN FINANCIAL SUPPORT

- Create awareness of OSMH's funding priorities to help the foundation leverage donations
- Build and enhance the OSMH's brand as a trusted partner in patient care rooted in our legacy of service, that is deserving of the community's support and investment
- Increase OSMH Foundation's visibility with our stakeholders and the community through marketing and communications
- Increased focus on celebrating OSMH and OSMH Foundation's successes
- A continued focus on demonstrating Impact to our donors

BUILDING A CULTURE OF PHILANTHROPY

- Continue to position OSMH Foundation as a trusted charity of choice throughout the community
- Encourage a culture of philanthropy within our hospital family through increased communications and one to one engagement of staff members
- Update the Grateful patient program and create and implement a Clinician Engagement strategy to enable clinicians to play an active role in the philanthropic process. This will help build meaningful partnerships with clinicians (primarily physicians) who can identify the best prospects, produce compelling cases for support, drive the philanthropic revenue for OSMH and work toward increasing their own personal financial participation.
- Build and maintain a highly motivated fundraising team. Ensuring we have the right staff focused on the right things and continue to invest in learning and growth.
- Provide our donors and volunteers with the best possible experience and support them as they reach out