



# **STRATEGIC PLAN**

**2016 - 2020**

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## For Pete's Sake Cancer Respite Foundation

### *History and Present*

**Peter Bossow** experienced a “life takeover” in 1998 when he received a cancer diagnosis at age 29. Within seconds of hearing the words “poor rate of recovery” from his physician, the burdens of fear, anxiety, worry and panic entered the lives of Pete, his wife Marci, and their vast network of loved ones.

Not knowing how else to help the young couple, Pete and Marci's family and friends provided a gift – the gift of **respite**. This last cherished trip allowed them to temporarily escape the burdens and hardships that accompany cancer and to rebound from its crushing blow. Going away together helped them reconnect as a couple. It reminded them that the loving foundation of their marriage, although rocked by cancer, was still strong and intact. Their experience produced lasting memories of a time without financial boundaries or agenda. For a week, they celebrated the preciousness of life, relished the intimacy of a husband and wife and dwelt only in the present. The joy of this respite was the only certainty in a completely uncertain future.

After Pete's death, Marci celebrated the gift that was given to them by their loving friends and family by recreating it for others – thousands of others.

### **For Pete's Sake was born.**

Today, For Pete's Sake has become the caring and compassionate organization that Pete envisioned. Using a proven model, For Pete's Sake has developed the concept of respite as it relates to the young adult cancer patient population, becoming the only respite centric organization in the country. Relying on nominations from Oncology Team Members in the Greater Philadelphia area and across the United States, FPS has developed clinical assessment factors that best identify those patients and their families that would best benefit from the gift of respite as part of the continuum of cancer care. Using these factors, coupled with quantitative and qualitative outcomes measures, FPS has established itself as a leading authority in respite care for clinicians eager to assist patients with the psycho-social factors of a cancer diagnosis. With demand for service beyond the capacity currently available, FPS has been gradually opening doors to patients the tri-state area with strategic partnerships in certain geographic locations. Since 1999, For Pete's Sake has helped almost 5,000 people take a break from cancer to refresh, reconnect and rejuvenate during their journey.

### **The FPS Program – the Gift of Respite**

Each respite is scheduled by a For Pete's Sake program coordinator and is tailored towards the specific medical and personal needs of the patient and family members. A typical respite lasts 7 days, and includes a generous cash stipend, travel costs, accommodations, a For Pete's Sake welcome bag with travel items and other materials that assist in the respite experience, including journals, spiritual books on coping and hope, special gifts and a camera. Every child that participates in the program receives a “Backpack Buddy” consisting of a sack with games and handwritten cards from peers. Upon return from respite, the patient completes a post-respite evaluation which in turn is correlated to monthly qualitative and quantitative outcome measures. Photos taken with the camera are also organized into a DVD keepsake and a special FPS photobook. Nominators too also return an evaluation for each patient that measures patient, caregiver and children's coping levels with cancer both pre-respite and post-respite. The measurements are captured quarterly. All results are posted on the organization's website.

Respite destinations vary for each patient and his/her needs. Currently, For Pete's Sake owns two respite homes in Davenport, Florida. The most recent respite home was purchased by a generous donation from the Johnny M. Foundation and is called Johnny's House, in memory of Johnny Murabito, Jr. Johnny was a young child who unexpectedly passed away while on vacation with this family in Florida. The Foundation and the Murabito Family have been committed to helping cancer patients escape with their loved ones in Johnny's House. In fact, The Foundation has taken their involvement one step further and has recently pledged to fund an agreed upon amount of complete respites that will take place in Johnny's House. In this way, they ensure that the home they purchased will be filled with love, laughter and memories for years to come.

For Pete's Sake supplements additional respites locations with the donation of vacation homes by private home donors and donated/discounted stays at resorts including CheapCaribbean.com, Nemaocolin Woodlands Resort , Woodloch Resorts and Great Wolf Lodge. Collaboratives with third party providers has enabled FPS to offer its respite services to a larger population and to a population that is outside of the immediate geographic location.

## The Importance of Credibility and Sustainability to Our Community

For any charity, credibility of the mission and sustainability of a nonprofit are at the forefront of every discussion about mission development. Thus, For Pete's Sake was founded on the premise that a successful organization would be one that is transparent, sustainable and credible. Thus, over the past fourteen years, FPS has proudly increased transparency and welcomed input from responsible constituents. Further, it has developed a Statement of Value Proposition which outlines those areas critical to credibility. This Statement is attached as Exhibit A. Further, below are a few of the ways which our credibility has been voluntarily bolstered because of concrete actions by our Board, staff and volunteers.



For Pete's Sake is proud to display this Seal of Excellence awarded by Pennsylvania Association of Nonprofit Organizations (PANO). Certification in the *Standards for Excellence* program is bestowed only to the most well-managed and responsibly governed nonprofit organizations that have demonstrated compliance with the 56 specific *Standards for Excellence* based on honesty, integrity, fairness, respect, trust, responsibility, and accountability. FPS has met, complied with, and integrated the certification program. For more information about the *Standards for Excellence* program, visit <http://www.pano.org/Standards-For-Excellence/>.



Guidestar is a third party reviewer of nonprofit organizations, maintaining a website at [www.guidestar.org](http://www.guidestar.org) with pages dedicated to each registered nonprofit. Most GuideStar pages present data submitted to the IRS. IRS information, however, doesn't always provide GuideStar's 22,000 daily visitors a complete or timely picture of the nonprofit. The GuideStar Exchange is an optional way to present complete information to the public through a 3<sup>rd</sup> party verified website.

**65** Respite Locations (On Average) are Donated to For Pete's Sake by Companies and Private Donors.

Two For Pete's Sake-owned homes in Davenport, Florida and various homes and resorts at the Jersey Shore, the Carolinas, the Poconos and the Caribbean.

**325** Oncologists, Nurses, Social Workers & Patient Navigators Have Nominated at Least One Patient to Receive a For Pete's Sake Respite.

For Pete's Sake receives nominations from oncology professionals at over **100** hospitals and cancer treatment centers.

### Our Hospital and Cancer Center Network Includes:

- University of Pennsylvania Health System
- Christiana Hospital
- Fox Chase Cancer Center
- Bryn Mawr Hospital
- Cancer Treatment Centers of America
- Dana Farber Cancer Institute
- John's Hopkins
- New York University Cancer Center

## Our Proven Outcomes



### OUR PATIENTS REPORT (ON A 4 POINT SCALE):

Did respite fulfill FPS mission?	3.89
Was our Correspondence Adequate?	3.87
Were Accommodations Satisfactory?	3.82
Did Respite Help You in Coping with Cancer?	3.95
Did Respite Help Caregiver in Coping with Cancer?	3.88
Did Respite Help Family in Coping with Cancer?	3.89
Did Respite Impact Everyday Outlook on Living?	3.95
Was Cash Stipend Adequate? (No=1, Yes=4)	3.85

## Our Collaborators

For Pete's Sake receives support from many generous and reputable companies. Here is a small sampling of them and a full list can be found on our website.



## Our Mission in Action

FPS has modeled its program with a focus on the overall concept of coping with cancer by the entire family unit, including this patient, caregiver and often, young children. Studying both the qualitative and quantitative data routinely obtained by FPS staff following a family respite, a volunteer psychologist has identified four common themes associated with respite benefit. These themes include:

- 1) Improvement in Relationship quality among family members (this includes spouses and children of varying ages)
- 2) Work and life endurance/ Renewed stamina for the cancer journey
- 3) Patient treatment compliance post respite with established protocols
- 4) The Benefit of Joy/Mental break in the continuum of care for patients.

FPS hopes to extend its evidence-based program by compiling data focusing on these areas immediately post respite, six months post respite and one year post respite for all participants, including patient, caregiver and children. This data is being collected to further support the necessity of respite as a family and social support to improve connections not only within the immediate family unit, but with other natural societal connections including those with one's medical team, one's work community, one's neighborhood community and one's extended community.



*"This vacation was perfect in so many ways. After months of treatments, we created so many great memories and moments. I forgot about cancer for a whole week and took Orlando by storm! With the stipend provided, we lived it up to the fullest. It was the best vacation I ever had and my family feels the same way. After our trip, I came back stronger than ever, prepared for surgery and ready to recover and become cancer-free!"*

*-Eric Bascelli, 28, traveled to Johnny's House in Davenport, Florida with his fiancé and daughter.*

*"I want to express my gratitude for giving my family the vacation of a lifetime. The trip and experience from beginning to end was wonderful. The home in Davenport was great and is in excellent condition...it was just like checking into a hotel room, only better! The past 11 months have been like a whirlwind to me. This trip allowed me to spend quality time with my husband and my boys, and not to have to worry about travel arrangements, money or itineraries." – Doris Daniels 29, traveled to the FPS Home in Davenport, Florida with her husband and two children.*



## Introduction and Executive Summary

What a Gift! This short statement truly sums up the last fourteen years as Founder of For Pete's Sake Cancer Respite Foundation. We have been able to share the gift of love and laughter with so many families facing the devastating disease of cancer. We have been showered with the gift of generosity from so many donors who have given selflessly of their time, talent and treasure. And today, we cherish the gift of the FPS community in our own lives. Each one of us is part of the wrapping paper that keeps our gift of an FPS respite vacation continually available to those in need.

We have been able to help thousands affected by cancer over the past years and today, clinicians rely on our organization in their treatment protocol related to the psycho-social effects of cancer. With this in mind, we have approached this strategic plan from a sustainability standpoint with an ultimate goal of ensuring that FPS will play a part in the continuum of care for years to come. While we will continue to help more and more families each year, we will also sharply focus on organizational stability through the creation of endowment and reserve funds. While the past thirteen years have been a journey, we know that the future too will also unfold as we remain focused on our strategic initiatives.

While we look to continually expand our program, we will always maintain the integrity of respite in the continuum of cancer care. This level of commitment to our mission is the driving force behind the creation and adoption of this strategic plan. Our four main themes reflect this level of commitment. First, External Stakeholder Focus is our recognition that FPS is powered by external forces passionate about improving the lives of cancer patients. We have a fiduciary duty to each and everyone one of our stakeholders. Second, Financial Stewardships is critical to the integrity of the organization as a whole. Third, Excellence throughout the entire organization has been critical to our past success and will continue to springboard us into new opportunities that present themselves. Lastly, the most precious gift of the nonprofit are those people who execute our mission. With this in mind, our final strategic theme is the welfare of our staff and volunteers.

As we look to execute this plan, let us keep in mind the famous quote of William Penn: "I expect to pass through life but once. If therefore, there be any kindness I can show, or any good thing I can do to any fellow being, let me do it now, and not defer or neglect it, as I shall not pass this way again." Thank you for your interest in FPS, our mission and most importantly, the lives we touch each and every day.

Let us take this moment, seize this moment and most importantly, cherish the gift of kindness in helping another as we look forward to the future of FPS! For Pete's Sake, for Patients' Sake, for Our Sake, let us unite and as we pass through this world, work together to make it better!

Join Us!

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## For Pete's Sake Strategic Methodology and Framework

The For Pete's Sake Board of Directors and the Senior Leadership Team utilized a thorough strategic planning process to identify and prioritize the key strategic objectives and improvement initiatives for the next few years.

All of the key internal and external stakeholders provided input to the planning process to ensure that all important issues would be considered when setting the priorities.

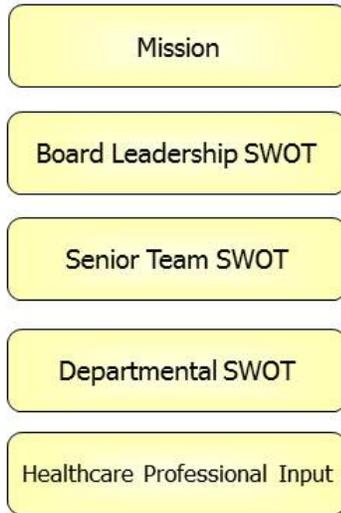
The planning process outputs included a Strategy Map and the creation of initiative charters. Improvement initiatives are the primary tactical tools to successfully execute the strategy. These charters provide more detail and assign tasks and timelines to responsible staff and volunteers who will complete them. For Pete's Sake will focus on no more than 4 Initiative Charters at one time, which is the recommended strategy for a staff of our size.

This strategic planning document contains five primary components:

1. The FPS Strategic Framework
2. The Strategic Formulation Process used to develop this Plan
3. The FPS Mission and Vision
4. The FPS Strategy Map
5. The Key Improvement Initiatives

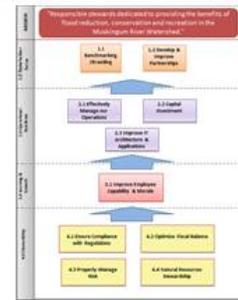
# Strategy Formulation

## Strategic Planning Inputs



Strategy Formulation

Organizational SWOT



A simplified visual of the strategic plan narrative that can be executed

Scorecard

Perspectives, Objectives, Key Initiatives, and Measures



p. 2

Measure » Action » Results  
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Using this process, FPS developed a comprehensive SWOT Analysis to identify **Strengths**, **Weaknesses**, **Opportunities & Threats**. Exhibit B is a detailed analysis of this exercise. As the SWOT Analysis was evaluated, recurrent themes were used in the identification, evaluation and priority of the strategic plan initiatives.

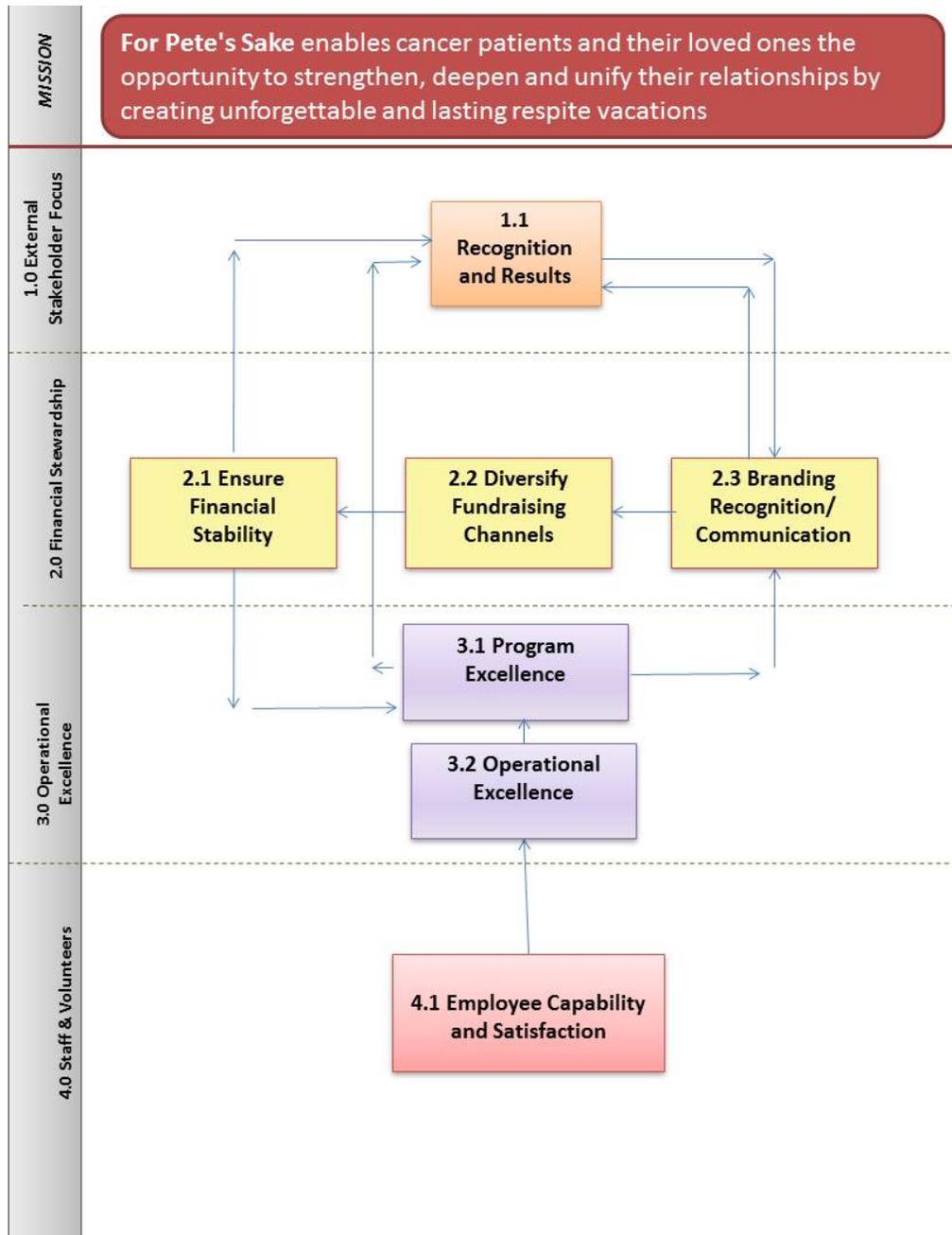
## **Mission**

"For Pete's Sake Cancer Respite Foundation enables cancer patients and their loved ones the opportunity to strengthen, deepen and unify their relationships by creating unforgettable and lasting respite vacations."

## **Vision**

By 2020, FPS will be nationally recognized for excellence in its respite vacation program, fully engage the community and serve more patients. Our operations will be transparent, efficient and effective, executed by happy, talented, productive and engaged employees. We will be highly regarded by all stakeholders and our impact on families facing cancer will be supported by evidence-based data.

## 2013 FPS Strategy map



As evidenced by the above Strategy Map, For Pete’s Sake’s strategy focuses ultimately on financial stewardship and operational excellence. Using a “balanced” approach yields objectives across 4 key perspectives or strategic areas:

1. **External Stakeholder Focus**
2. **Financial Stewardship**
3. **Operational Excellence**
4. **Staff and Volunteers**

## **1. External Stakeholder Focus**

FPS has a number of stakeholders engaged in the mission of the organization. These stakeholders fall into three main categories of audience: patients and their families, nominating professionals and donors. As part of a focus that addresses all three of these areas, FPS will concentrate on the following area related to External Stakeholder Focus:

### **1.1 Recognition and Results**

## **2. Financial Stewardship**

While FPS is driven by its mission, the Board and staff have a fiduciary duty to ensure the financial stewardship of the organization so that FPS can effectively execute its mission. With this mind, the following three areas of Financial Stewardship will be considered over the next three to five years:

### **2.1 Financial Stability**

### **2.2 Diversifying Fundraising Channels**

### **2.3 Brand Recognition and Communication**

## **3. Operational Excellence**

As part of its strategy, FPS will ensure that all functions of operation, both from a program and management perspective, are pursued with excellence in execution, completion and evaluation. With this premise, the following two areas have been identified as related to this theme:

### **3.1 Program Excellence**

### **3.2 Operational Excellence**

## **4. Staff and Volunteers**

The FPS model includes a limited staff which is then powered by the use of volunteers. With personnel being the single greatest asset of FPS ensuring that both staff and volunteers are adequately trained and compassionately treated is critical to the organization's future. Hence, the following has been prioritized:

### **4.1 Employee Capability and Satisfaction**

These seven strategic themes, therefore, have become the focus of this plan. Within each theme, the team has identified Strategic Initiatives to which time, talent and resources will be committed. The following pages identify the Initiatives and Initiative Charters have been compiled. These Charters are found on subsequent pages and include the following information: Business Case, Objectives, Scope, Team Composition, Key Initiative Milestones, Updates and Measurements

## Organizational Strategic Initiatives

The following high-priority initiatives focus on recognition and results, financial stability, fundraising channels and employee capability and satisfaction. We believe that these initiatives will help us set the framework for a broader program reach and continued program and operational excellence.

**Strategic Theme:** *Recognition and Results*

**Goal:** *Prove the benefits of a For Pete's Sake Respite Vacation*

**Initiative:** **1.1.1 Clinical Outcome Results**

Become a known leader in wellness and palliative care for adult cancer patients by proving that a FPS respite has a lasting impact on the well-being of patients. Identify the short-term and long-term benefits that a FPS respite has on cancer patients.

**Long-Term Initiatives:**

**1.1.2 Expanded Nominator Network**

**1.1.3 3<sup>rd</sup> Party Validation from Published Clinical Outcomes**

**Strategic Theme:** *Financial Stability*

**Goal:** *Endow FPS and ensure continued operation in uncertain financial climates*

**Initiative:** **2.1.1**

Create an endowment program that will encourage HNW donors to support FPS and ensure the future stability of the respite vacation program. This will include the potential for a unique home donor model, in which donors purchase a home and ensure the home is filled with respite travelers for years to come.

**Initiative:** **2.1.2**

Create a planned giving program that will encourage donors to think in new ways about the ability to give to FPS in the future.

**Long-Term Initiatives:**

**2.1.3 Reserve Strategy**

**2.1.4 Succession Planning and Cross Training**

**Strategic Theme:** *Fundraising Channels*

**Goal:** *Diversify fundraising channels*

**Initiative:** **2.2.1 Diversify Fundraising Channels with Monthly Giving Programs**

Implement new fundraising channels that encourage repeat giving and engage the FPS donor community in more meaningful and impactful ways. This will include Pete’s Partners, a corporate caring initiative and the Mileage Club, a monthly giving club in which donor’s give directly through their bank account.

**Long-Term Initiatives:**

**2.2.2 Patient Engagement**

**2.2.3 Nominator Engagement**

**2.2.4 Volunteer Engagement**

**2.2.5 Sophisticated Donor Communications**

**2.2.6 Diversified Donor Base**

**2.2.7 Major Gift Program**

**Strategic Theme:** *Employee Capability and Satisfaction*

**Goal:** *Ensure employees are happy, engaged and talented.*

**Initiative:** **4.1.1 Employee Capability and Satisfaction**

Ensure that current employees are happy, talented, productive and engaged. Build a financial model that ensures appropriate talent can be hired within the next 5 years.

**Additional Themes:**

In addition to these initiatives and themes, FPS identified the theme of **Program Excellence and Brand Recognition/Communications**. Program Excellence did not have any initiatives associated with it, but issues may arise in the future. Brand Recognition/Communications has the following initiatives associated with it:

**Improved brand equity, trade mark and awareness**

**Packaged marketing materials**

**Marketing strategy/communications plan**

**Baseline exhibits including financial**

**Marci as a brand and a palliative care expert**

## Successful Execution of the Strategic Plan

- In implementing the Strategic Plan, For Pete's Sake will utilize initiative charters and will track progress on the last staff meeting of each month.
- In addition to the charters is a development and operations retreat in May 2013. During this time, a detailed plan was created for the 13-14 fiscal year and some of the initiatives may be completed during the timeframe.
- The initiative statuses will be updated monthly on Initiative Charters and measurements will be put into place.
- The Founder and President will report updates to the board at quarterly board meetings and through email as needed.
- Key For Pete's Sake staff will meet with Jack Steele of the Advisory Board Company as needed.