



# Strategic Plan Facilitation for Health Research Alliance

**PREPARED FOR**

**Health Research Alliance**

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**verynice helps businesses, non-profits, and governments expand their capacity for impact through design-driven innovation.**

With client experience spanning 500+ brands including the American Heart Association, Disney Imagineering, UNICEF, and Google, we provide hands-on strategic consulting, and facilitate workshop sessions. We start every single project using the same foundation of core principles: co-creation, anti-assumption, legacy-driven impact, and generosity.

## Goals & Objectives

### Background and Identified Need

The Health Research Alliance (HRA) is a member organization that is driven by a collaborative spirit, and a steadfast commitment to improving human health. The organization accomplishes this mission by building a community of nonprofit research funders who can pool resources and insights in order to impact the field of biomedical research.

HRA recently issued an RFP, seeking an external partner to guide the strategic planning process. Specifically, this Strategic Plan will serve as a five year roadmap, serving as a point of reference and a guide for decisions around resource allocation in order to best serve the members of HRA. The process desired by the review committee includes the following:

1. Developing a process for receiving feedback from a diverse array of stakeholders
2. Uncovering the value said stakeholders are current capturing from the organization
3. Identifying new opportunities to best serve the members, including programs of interest
4. Recommending changes to best align the organization with the current landscape

## Our Experience

### Moving the Needle for Over 700 Nonprofit Organizations

verynice is a design strategy practice that facilitates creative problem solving initiatives with clients and communities. While verynice is known for its multi hyphenate nature, our sweet spot is in the creation of inclusive commitments to actions that can bring an organization closer to realizing its own unique mission and vision. Having worked with over 700 organizations across the globe, we are sensitive to the unique challenges faced by nonprofits. In addition to working with nonprofits, we also work with clients in the private sector, providing us with a uniquely entrepreneurial perspective that we bring to every project we take on.

At verynice, we are excited to take on meaningful challenges each day that contribute to the creation of a more healthy and equitable society. Over the past decade, we have worked with 80+ organizations in the healthcare sector. This makes up for roughly 20% of our projects and initiatives. In addition, we have significant experience working on issues related to education, economic development, environmental sustainability, and the arts. Our diversity of experience allows us to uncover the intersections between issues in our society in order to create solutions with our clients that are creative and inclusive.

With the Pancreatic Cancer Action Network, we facilitated over 20 interviews with stakeholders from across the organization as well as a series of creative and collaborative workshop sessions in order to develop a new mission statement, vision statement, values, and series of 10 year goals for the organization. While the mission, vision, and values bring clarity to the organization's next 10 years in a more narrative way, the goals we developed with the organization include hard numbers, spanning fundraising, reach and awareness, and pancreatic cancer 5 year survival rate goals.

Through a multi-year partnership with the American Heart Association, we have been able to help the organization revitalize its Heart Walk initiative, develop a strategic value proposition statement, build capacity for design research in rural communities, and set long term vision and plans of action with measurable goals. Over our 20+ strategic initiatives with the AHA, we have conducted interviews with stakeholders from across the organization, conducted an industry trends analysis in the spaces most relevant to the work of the AHA, and facilitated a series of intensive workshop sessions to gain unique insights from advisors across the organization.

At verynice, we are passionate about creating long term visions with our clients in a manner that is consensus-driven through co-creation and creative facilitation. In addition, through our experience in strategic planning, we work with clients to not only set visions, but achieve them. Finally, we believe in having fun with our clients, and enjoying what we all have the privilege to do together.

verynice is more than just a consulting practice. We are a social enterprise. Driven by a mission to alleviate expenses for non-profits and increase access to design strategy for all, verynice launched in 2008 as one of the first examples of social enterprise in the design industry. Over the course of a decade, through a range of impact models and initiatives, verynice and its network of volunteers have provided thousands of organizations, practitioners, and students with access to over \$30,000,000 USD in discounted or pro-bono services and free educational resources. We are thrilled to extend a discount for our services to the HRA in recognition of your incredible work.

## In Good Hands

Our engagement with the HRA will be led by Matthew Manos and Austin Bauer from the verynice team. Matthew and Austin have worked on a diverse range of strategic initiatives for organizations such as the Pancreatic Cancer Action Network and the American Heart Association.

### **Matthew Manos:** *Founder and Managing Director*

Called “crazy or genius” by Forbes, and recognized as one of the 100 most influential creatives working today by HOW Magazine, he is the Founder and Managing Director of verynice, and is the creator of design strategy methodologies leveraged by entrepreneurs and educators spanning 150+ countries. Matthew has deep experience in facilitating strategic planning processes that have resulted in lasting organizational change. He holds an MFA from ArtCenter College of Design and is currently an Assistant Dean at the University of Southern California.

### **Austin Bauer:** *Strategic Advisor and Facilitator*

Whether he is serving as an organizational consultant, workshop facilitator, executive coach, or design researcher, Austin uses his intense curiosity and love of questions to elicit insights that foster tangible growth and improvement. With a focus on continuous improvement, peer learning, and deep listening, Austin has worked with over 1,500 leaders at advertising agencies, market research firms, national nonprofits, tech startups, and Fortune 500s including YouTube, CBS, The American Heart Association, Edelman, and Omnicom. Austin holds degrees in Communications and Documentary Film from UCLA, is a certified executive coach.

## Project Scope

To accomplish the objectives and goals outlined above, verynice's process will be built from our years of experience working with nonprofit organizations on strategic planning and visioning exercises. The following outlines our proposed approach for this engagement.

### **Phase 00: Project Kick-Off**

Prior to beginning the project, verynice will host a one (1) hour kickoff meeting with the Strategic Planning Committee in order to gain clarity on the organization's current state, walk the team through the project planning process, and get acquainted with one another.

### **Phase 01: Stakeholder Interviews and Survey**

To begin the project, verynice will work with the Strategic Planning Committee to identify a group of 20 key stakeholders to conduct phone/video interviews with. The purpose of these interviews is to identify the perceived value of the organization and member benefits to each stakeholder. In addition, the interviews will seek to identify any weaknesses, and will encourage each stakeholder to share their own concepts for various opportunities the organization may pursue. Each interview will be 30-45 minutes, and will be lead by a facilitator, along with a notetaker from the verynice team.

While the RFP suggested 40-60 interviews, we are suggesting reducing this to 20 in order to collect the remaining insights from our collaborative workshop (detailed in the proposal under "Phase 03: Strategic Planning Workshop Session"), with an additional ~30 participants. In order to supplement the findings from these interviews, verynice will also develop a survey that will be distributed online to a larger group of stakeholders. Like the interviews, these surveys will expose strengths, weaknesses, and opportunities.

For both the interviews and survey, the Strategic Planning Committee will be involved in the research design process. verynice will develop an initial draft of our interview guide, as well as an initial draft of the survey design in order to solicit feedback from the Committee. Based on any feedback, we will iterate as needed until everyone feels comfortable with the questions and approach.

### **Phase 02: Industry Trends Analysis**

To prepare for the workshop, verynice will complete an environmental scan of futures trends and early signals of change relevant to HRA's programs and value proposition. We will research across several timelines including, short-term (0-3 years), medium-term (3-5 years), and long-term (5-10 years). verynice will then incorporate these insights about longer-term trends and their possible implications into the final research deliverable to help HRA understand the current landscape, think critically about the future it wants to create, and understand how nearer-term strategies serve

those longer-term goals.

### **Phase 03: Strategic Planning Workshop Session**

Following the completion of our interviews, survey, and industry trends analysis, verynice will facilitate a highly creative and collaborative virtual workshop session with up to 30 participants. We estimate the session to take place over the course of three hours, and the session will supplement our findings by challenging participants to invent new ways to improve HRA membership, while also engaging in a strategic planning process to understand how those ideas could come to life.

### **Phase 04: Research Deliverable**

All of the work completed throughout the engagement will be summarized in a report that contains key insights from the workshop session as well as the interviews, survey, and industry trends analysis. The research deliverable will be provided as a PDF file, and will include the following:

#### Section 01: Interviews and Survey Synthesis

1. Key direct quotes from the stakeholder interviews
2. Key insights from the stakeholder interviews, categorized by affinity group
3. Key insights from the survey

#### Section 02: Industry Trends Analysis

1. An overview of the key signals of change, emerging issues, and trends in the direct industry that HRA works within
2. Additional signals, emerging issues, and trends from industries peripheral, but related to the areas in which HRA operates

#### Section 03: Workshop Documentation and Synthesis

1. Key insights from the workshop session
2. Documentation of participant contributions during the workshop session

#### Section 04: Strategic Recommendations

1. Specific recommendations based on all of the data gathered and research performed
2. High-level future scenarios informed by direct and peripheral industry trends
3. Suggested action-items and additional considerations for the Strategic Planning Committee to reflect on as they go on to finalize the strategic plan.

## Proposed Budget

The following is a breakdown of the proposed budget for the strategic planning facilitation engagement with HRA.

Phase	Activity/Deliverable	Market Rate
Phase 00: Project Kick-Off	One (1) hour kick-off meeting	\$0.00
Phase 01: Stakeholder Interviews and Survey	Completion of up to 20 stakeholder interviews, survey design and administration	\$6,250.00
Phase 02: Industry Trends Analysis	Scan for relevant trends and future signals	\$2,000.00
Phase 03: Strategic Planning Workshop Session	Design and facilitation of three hour virtual workshop session	\$3,000.00
Phase 04: Research Deliverable	Final research deliverable with key insights from all phases, and strategic recommendations	\$6,000.00
Total Market Rate:		\$17,250.00
+ 25% Pro-Bono Discount:		- \$4,312.50
Total Cost:		\$12,937.50

## Project Logistics and Payment Schedule

verynice is available to begin the engagement upon receiving a full initial deposit (should the project's overall budget fall beneath verynice's typical project minimum of \$10,000) or a 50% initial deposit (should the project's overall budget meet or exceed verynice's typical project minimum of \$10,000) to reserve project time and resources, plus a signed work agreement. Additional work and changes outside of the scope listed above (including new services or additional revisions) will be billed at our standard hourly rates of \$250/hr for strategy work. However, verynice will not perform out-of-scope work that incurs additional fees without receiving prior client consent, and it is not anticipated to be necessary under this scope.

The flat-fees quoted above are valid for 30 days from the date of this proposal. After this 30-day period expires, the Client must solicit a new project quote from our team before we proceed to contract for the work described above.



In 2008, verynice was established with a bold aspiration: to, one day, become known as the most generous design firm in the world. Over the past decade, through our unique give-half model and open-source philosophy, we have realized this mission by providing thousands of organizations and practitioners from 170+ countries with access to over \$30,000,000 worth of free and discounted resources and services.

Looking forward, we are excited to continue inspiring the next generation of business leaders to seek balance between giving and getting.