

Cancer Legal Care Strategic Plan 2020 — 2023

APPROVED BY THE BOARD OF DIRECTORS AUGUST 18, 2020

INTRODUCTION

A cancer diagnosis is devastating. Its impact, immediate and complicated, consumes every aspect of a person's life — physical, spiritual, emotional, and financial. When legal issues surrounding employment, benefits, insurance, housing, or estate planning arise and compound, they affect patients' and their caregivers' quality of life in profound ways.

Cancer Legal Care eases that impact by engaging the law to resolve the complex challenges facing people and communities affected by cancer. The financial and legal challenges Minnesotans with cancer face have a direct and negative impact on their survivorship and health outcomes. Access to free legal services helps turn this around. In 2007, we set out to fill a gap in services for people affected by cancer by making legal care available to cancer patients/survivors and their families.

Ever since, Cancer Legal Care has been serving the Minnesota cancer community. We do not limit our care to specific cancers; we serve clients affected by all cancers at any point in the cancer experience. We are here for everyone: patient and caregiver alike, from the point of diagnosis to the end of life and beyond. We serve clients from all income levels, providing consultations and advice for everyone, as well as additional legal care by way of free estate planning services for clients who meet certain income criteria. We provide service throughout the entire state of Minnesota. As an independent nonprofit organization, we are not part of a health care system, health plan, or governmental entity; this means we can prioritize cancer without other issues redirecting our attention elsewhere. These qualities combine to make Cancer Legal Care's innovative model one of a kind in the state and the nation. We are leading the way to a better, more expansive model of whole patient cancer care.

Cancer Legal Care staff, volunteer attorneys and advocates draw on a wealth of knowledge and experience to help our clients. Our clients' questions are answered immediately by attorneys who understand their issues in the larger context of cancer and survivorship. While many cancer patients and survivors don't even realize they need a lawyer, attorneys can open doors, provide help they never knew was available, eliminate roadblocks, troubleshoot and plan for potential issues ahead, and aid in navigating the maze a cancer diagnosis inevitably entails.

Each year, the need for our service grows. Increasingly, the financial toxicity of cancer — income loss, high premiums and deductibles, crushing debt, and inability to afford care even with insurance — wreaks havoc on those already undergoing the greatest threat to their lives they've ever encountered. That toxicity impacts people at every income level. Over the years we have seen too many clients who never dreamed their financial lives would be devastated because of a cancer diagnosis. Additionally, with 40 percent of every individual's health determined by social and economic factors, cancer's financial and legal challenges are especially devastating to those who were already among the most vulnerable in society and are least able to deal with its consequences. Nearly all these factors are tied to underlying legal issues, which is why a lawyer is needed to address and remedy the financial hardships cancer so often brings.

Cancer Legal Care is currently in a transformative phase of our existence. The world has been changing since our organization began, and now we must decide how we will change as well. COVID-19 has changed the landscape of how we all live and conduct business. At the same time, demand for our services is increasing, and the pandemic has allowed us to increase our expertise and respond appropriately to new client needs. Our organization, programs, outreach, and donor base have been growing for years, and we are beginning to be recognized for our value to the larger health community in Minnesota. We are balanced in our size, geographic reach, and accountability to our clients. Today, we find ourselves in a position to build on our successes and to move from a phase of growth to one of maturity.

This Strategic Plan, covering the remainder of Fiscal Year 2020 through the end of Fiscal Year 2023, will guide us in this next phase of development. Cancer Legal Care staff and board will share in operationalizing and implementing the plan. Importantly, the goals contained in this plan are not intended to supersede those activities deemed essential for the operation of the organization, either in times of crisis or under more ordinary circumstances. Rather, by providing new direction to our coming initiatives in areas of advocacy, growth, sustainability, and communications, this Strategic Plan will drive us toward an improved model so Cancer Legal Care can provide an even higher level of service to our clients.

At Cancer Legal Care, we are ready to embrace change, and to take whatever opportunities we can to move our mission forward and ensure this organization thrives, now and in the future.

OUR MISSION

CANCER LEGAL CARE ENGAGES THE LAW TO RESOLVE THE COMPLEX CHALLENGES FACING PEOPLE AND COMMUNITIES AFFECTED BY CANCER.

OUR GUIDING PRINCIPLES

- Helping all Minnesotans affected by cancer
- Understanding our clients' unique situations
- Responding to clients quickly with appropriate options
- Building on our successes
- Cultivating and retaining our donors
- Being accountable to all stakeholders — clients, donors, volunteers, partners, staff, and board
- Being flexible, and taking advantage of opportunities for action
- Creating a model for others to follow

THEMES AND GOALS

01 *THEME: ADVOCACY*

Sometimes the law itself creates problems even the greatest legal maneuvers cannot overcome. By supporting public policies and other initiatives that help prevent cancer, increase access to care, or eliminate legal challenges faced by our clients, we will improve health throughout Minnesota and strengthen our ability to help those who need it the most. Activities such as education, identifying legislation to support, direct advocacy, and coalition-building should all be viewed through the lens of Cancer Legal Care's mission and guiding principles. Policy advocacy will help us grow in all areas, but we now need to establish guidelines to better understand this branch of our work.

GOALS

- Analyze the public policy landscape both in Minnesota and nationally, determining areas of Cancer Legal Care's weakness and strength
- Identify existing coalitions and precedents for advocacy work related to Cancer Legal Care's mission and activities (including funding opportunities)
- Craft an advocacy framework articulating how Cancer Legal Care will make decisions, identify scope and parameters for advocacy activities, and operationalize ideas
- Take maximum advantage of opportunities for advocacy and action that support Cancer Legal Care's mission

02 *THEME: GROWTH*

For Cancer Legal Care, growth is defined as what we do externally to better serve Minnesotans facing cancer and their caregivers. While our services are available to all Minnesotans, we are not reaching various communities, including cancer survivors in Greater Minnesota and communities of color, in as meaningful a way as possible. Growing our organization to improve our outreach to these communities, as well as helping to refer them appropriately to resources best able to serve their needs, will ensure all Minnesotans have good access to the essential services we provide.

GOALS

- Expand Cancer Legal Care's geographic reach into currently underserved Minnesota cities and areas, including Greater Minnesota regions in need
- Improve racial and geographic representation among Cancer Legal Care's clients
- Better understand and expand the base of community nonprofits to which Cancer Legal Care refers our clients

03 **THEME: SUSTAINABILITY**

We define sustainability as what we do to keep pace with our growth. We have experienced significant fundraising success in recent years, but changing health systems and other external factors mean future funding sources will be in flux. At this turning point in Cancer Legal Care's life, it is essential we set the organization up internally for long-term success. Variable grant funding makes individual donor giving more important than ever, but we must also be innovative and opportunistic in pursuit of new funding sources. Taking a longer view of our financial security and formalizing our model of operations will ensure our survival regardless of funding fluctuations and staff and board turnover.

GOALS

- Increase individual giving (aspirationally, by 25 percent annually)
- Maintain one year's operating budget in reserves
- Diversify sustainable income streams by maximizing opportunities to generate revenue from new funding sources
- Improve racial and geographic representation among Cancer Legal Care personnel (staff and board)
- Create a standard operating procedures/knowledge "playbook," formally defining operational capabilities and staff and board roles
- Create a succession plan for key positions within the organization, both board and staff

04 **THEME: COMMUNICATIONS**

Often people facing cancer don't understand why they need legal help and have no concept of the options available to them. An improved communications platform will serve the organization by accurately describing the value we bring to our clients and the greater health community, by cultivating funding opportunities, and by reaching as many clients as possible. We are the established leader in providing legal care to cancer survivors in Minnesota, but we are not always a recognized leader. Improvements in areas such as branding and media strategy will help us maximize our impact and overcome threats of various types. And new technologies may provide us greater opportunities to communicate with stakeholders such as clients and donors, ensuring they recognize their relationships with Cancer Legal Care as an organization, rather than simply with individual staff members.

GOALS

- Educate the cancer community and the public about the help legal care can provide cancer patients and survivors
- Review and evaluate current Cancer Legal Care branding and other core intellectual property components
- Identify opportunities to establish the organization as a thought leader on the topic of legal care for cancer
- Research new ways to engage with clients and donors

EVALUATION

Evaluation is essential to measure progress made toward the goals contained in this plan, ensuring accountability and informing programmatic development and direction. The Strategic Planning Committee, a standing committee of the Cancer Legal Care Board of Directors, will create a meaningful framework for an annual evaluation of activities and outcomes related to this Strategic Plan. By annually evaluating our efforts, we will retain the flexibility necessary to course-correct as appropriate, to build on our strengths and expand our programs and partnerships, and to best serve the evolving financial and legal needs of the Minnesota cancer community.

