



Strategic Plan – FY26-28

June 25, 2025

Executive Summary

- Willow House exists to develop and provide supportive services for children, teens, families, schools, and communities who are coping with grief related to death loss.
- For the first time in recent memory, Willow House engaged in a strategic planning effort. The goal was to create a roadmap for the next 1-3 years that was aspirational, inclusive, realistic, and actionable.
- In early 2025, a survey gathered responses from 32 members of the Willow House community, including family members, volunteers, board members, staff, interns, donors, and referral partners. The feedback offered visibility into Willow House's strengths, weaknesses, opportunities, and threats. A dedicated group of stakeholders gathered to discuss this feedback and design the following vision for the future.
- The strategic plan centers on three core elements:
 - **Programs:** Willow House provides an important service and fills a gap in the market for grief support. Willow House will optimize current programs, expand reach, and add new services.
 - **Awareness:** Willow House is known primarily through word-of-mouth marketing. Willow House will continue to be a trusted resource, become a recognized leader, and refine a compelling narrative about its work.
 - **Infrastructure:** To make the rest of the plan possible, Willow House will invest in its fundraising capacity, human resources, facilities, and partnerships.

An organizing framework



Awareness

Trusted resource. Thought leader.
Compelling narrative.

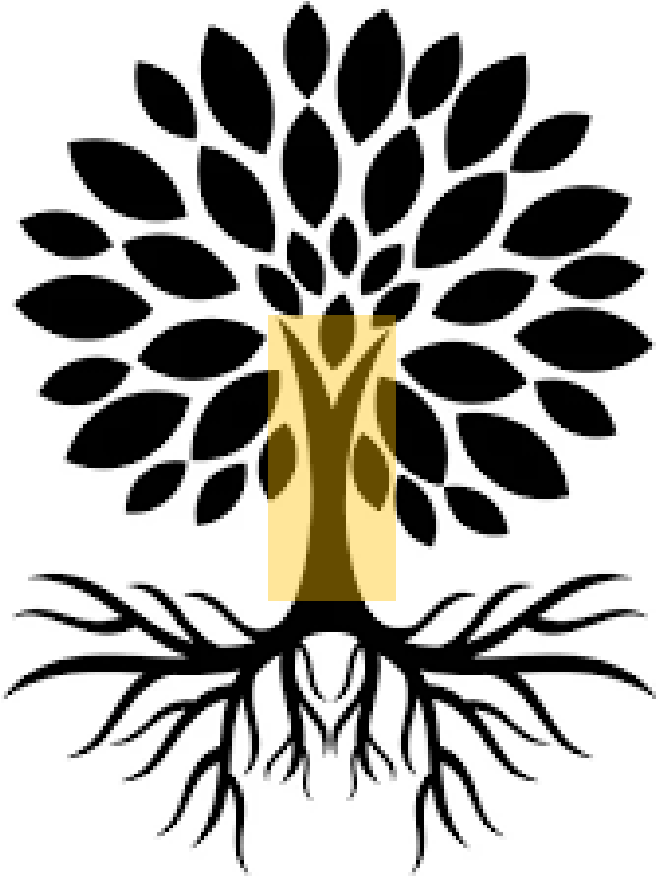
Programs

Optimize current programs.
Expand reach. Add new services.

Infrastructure

Money. People. Facilities. Partnerships.

Strategic Plan: PROGRAMS



WHY IS THIS A PRIORITY?

No child, teen, or parent should grieve alone. Providing support in community with others offers hope and healing. This is the core of Willow House.

WHAT WILL WILLOW HOUSE DO?

1. Survey families to learn what they want from the program schedule, including their interests, availability, and desire for potential summer offerings
2. Develop implementation plan and budget for revised program schedule (see above)
3. Partner with pre-existing community events for youth/teens
4. Run report of SOS youth and schedule a gathering
5. Grow attendance at existing small groups by increasing marketing efforts
6. Expand to Northern Lake County with FPS model

WHAT WILL WILLOW HOUSE NOT DO?

- Expand to other parts of Chicagoland or beyond
- Split up family members in small groups based on time frame from loss.

Strategic Plan: AWARENESS



WHY IS THIS A PRIORITY?

Grief touches everyone. People often suffer alone and without a supporting community. Building awareness of Willow House will reduce the hidden costs of unaddressed support.

WHAT WILL WILLOW HOUSE DO?

1. Understand and address unmet needs of current families
2. Understand and address why eligible families in our current communities don't attend/return
3. Assess strength of referral network to understand if grief-adjacent service providers understand the value Willow House provides and share it proactively and in a way that motivates families to join
4. Develop marketing strategy, including testimonials from past and current families
5. Develop PR strategy, including updates to the website and approach to social media

WHAT WILL WILLOW HOUSE NOT DO?

- TBD

Strategic Plan: INFRASTRUCTURE



WHY IS THIS A PRIORITY?

Infrastructure represents foundational needs that make everything possible.

WHAT WILL WILLOW HOUSE DO?

1. Form a Development Committee to create a fundraising strategy that includes diverse revenue streams, including HR/EAGs, earned revenue from schools, and individual cultivation
2. Form ad hoc HR Committee to research and recommend staff retention strategies
3. Expand the Board
4. Create a Young Professionals Board
5. Create Volunteer Advisory Board to better understand volunteer needs and build a sustainable connection and support structure
6. Form a Real Estate Committee to assess space needs and resolve facilities question
7. Work collaboratively with LBGC Board/Team to understand viability of partnership

WHAT WILL WILLOW HOUSE NOT DO?

- TBD

Implementation Plan: PROGRAMS

Theme	Activity	Owners	FY26				FY27	FY28
			Q1	Q2	Q3	Q4		
Optimize current programs	Survey families at group	Amanda	X					
	Run report of SOS youth	Krysty	X					
	Schedule SOS youth gathering	Lisa, Amanda, Megan, Vicki		X				
	Partner with community events for youth/teens	Megan	X	X	X	X		
	Increase marketing to fill existing small groups	Amanda	X	X				
Expand reach	Expand to Northern Lake County	Megan					X	
	Conduct market assessment for future geographic expansion*	Marketing Intern	X	X				
	Define strategic direction for geographic expansion*	Anya			X	X		
	Open new locations, if relevant*	Program Team					X	
Create new programs	Reconsider opportunities to offer education programs (e.g. finance), homicide support, individual counseling, and more	Megan?						X

Implementation Plan: AWARENESS

Theme	Activity	Owners	FY26				FY27	FY28
			Q1	Q2	Q3	Q4		
Be a trusted resource for survivors	Understand/Address unmet need of current families	Lisa, Megan		X				
	Understand/Address family attrition	Interns, Ethan (Salesforce)	X	X				
	Conduct interviews and focus groups of grief-adjacent service providers (Do they understand WH value? How do they communicate to families?)	Program Team, Marketing Committee	X	X				
	Assess strengths and gaps in referral network (see above) and refine approach	Marketing, Program Team		X				
	Implement refined approach to referral network, using volunteers for outreach, as appropriate	Mackenzie, Amanda, Megan		X	X			
Be a recognized leader in the field	Update the website	Jamie, Krysty			X	X		
	Engage social media agency (or delegate to intern?)	Krysty, Marketing Comm.		X	X	X		
	Develop a PR strategy (in time for NACG National Grief Awareness Month)	Denise, Jamie, Marketing Committee					X (Q2)	
	Explore collaborations with celebrities and influencers	Marketing Committee						X
Craft compelling narrative	Develop marketing strategy, especially focused on donors/grantors	Jo, Eric, Denise, Jamie, Anya, Marketing committee	X					
	Gather video, audio, and written family testimonials	Development Committee		X	X		X (Q1, Q2)	X (Q1,Q2)
	Update the mission statement?	Denise? Anya? Board?						

Implementation Plan: INFRASTRUCTURE (1 of 2)

Theme	Activity	Owners	FY26				FY27	FY28
			Q1	Q2	Q3	Q4		
Secure funding for a sustainable future	Form a Development Committee	Anya, Eric, Denise, Board	X					
	Create a fundraising strategy, including grants, corporate funding, events, and individual donors	Development Committee		X	X			
	Research potential fundraising options through HR/EAGs and other grant opportunities	Development Committee			X			
	Refine school strategy to seek revenue and/or fundraiser opportunities	Development Committee, Mackenzie?		X				
	Create a framework for individual cultivation	Development Committee		X	X	X		
People	Form an ad hoc HR Committee to research HR structures and benefits to retain staff	Nancy, Anya, Board		X				
	Implement recommendations from HR audit (e.g. employee handbook, job descriptions, etc.)				X	X	X	
	Expand Board-Board Development	Eric, Anya		X	X			
	Create Young Professionals Board: young, smart people with strong networks to hold events and drive fundraising, awareness, and board pipeline	Ezra		X				
	Form a Volunteer Advisory Board	Megan	X					
	Create volunteer engagement strategy: survey to understand pain points, increase communication, define volunteer roles, pair mentors, write FAQs	Megan, Amanda, Volunteer Advisory Board	X		X			

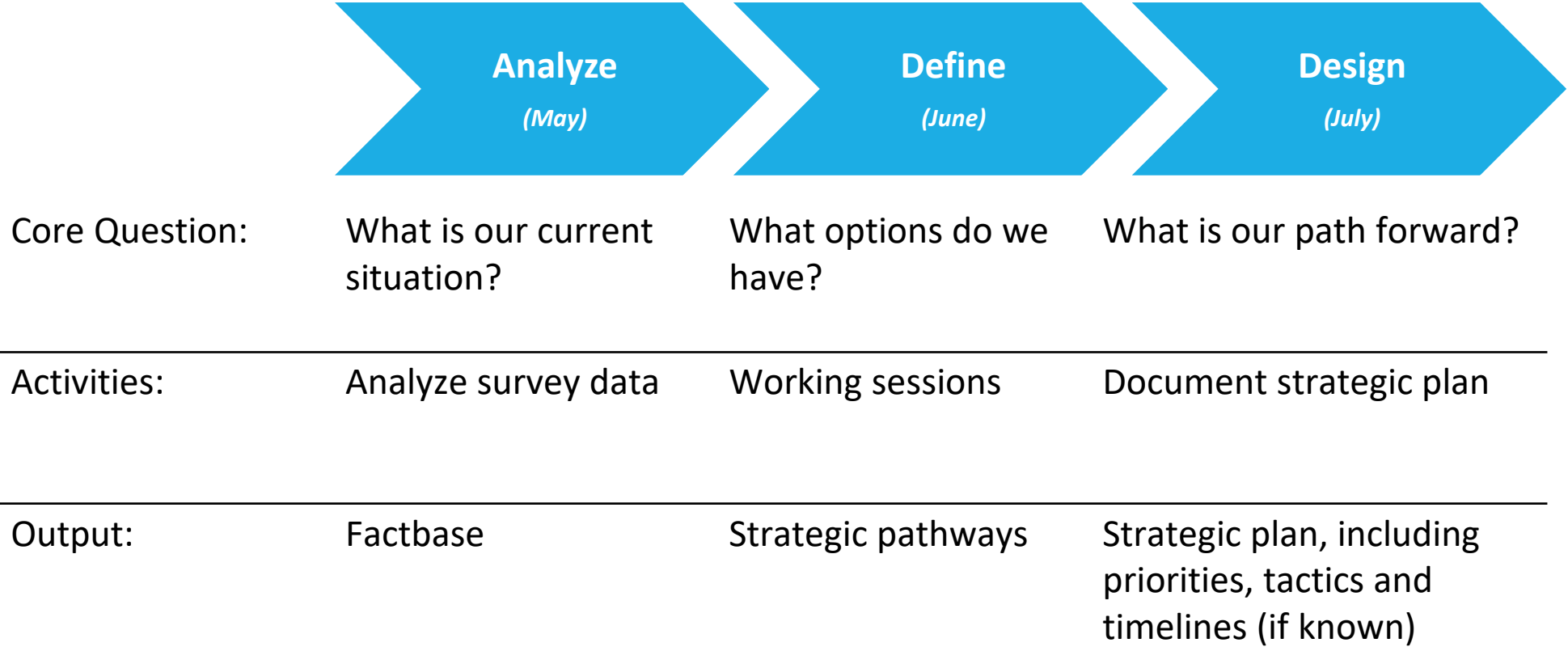
Implementation Plan: INFRASTRUCTURE (2 of 2)

Theme	Activity	Owners	FY26				FY27	FY28
			Q1	Q2	Q3	Q4		
Facilities and Partnerships	Gather input from staff and family members to document real estate needs for future staff and programs (location, visibility value, cost, etc.)	Anya	X					
	Form Real Estate Committee to research, evaluate and lock in alternative facilities	Kirk, Anya, Eric, Esther	X	X	X			
	Work collaboratively with LBGC Board and LBGC team to understand viability of LBGC-WH partnership	Eric, Kirk, Esther, Anya	x					

APPENDIX



Our roadmap



What does success look like?

A roadmap for the next 1-3 years that is:

- **Aspirational** – “keeps the good” and creates a compelling vision
- **Inclusive** – responds to diverse needs, aligns and connects all stakeholders
- **Realistic** – achievable given resource and capacity constraints
- **Actionable** – clear milestones and timelines



Elements of Strategic Plan

Programs

Optimize current programs

- Consistent or year-round schedule
- Fun gatherings (picnic?)
- Add children/teens to SOS
- Youth mentors
- Strengthen program attendance (groups & schools, teens & YA)
- Define pathways based on stage
- Prep newcomers

Expand reach

- Geographic expansion
- Serve minority groups (inner-city, LGBTQ+)

Create new programs

- Education programs (e.g. finance)
- Homicide support
- Individual counseling

Awareness

Be a trusted resource to survivors

- When someone dies in Chicagoland, survivors know and reach out to Willow House (age doesn't matter)
- Build on word-of-mouth marketing

Be a thought leader in the field

- National recognition
- Maintain partner relationships
- Attract celebrity attention

Craft compelling narrative

- Understand target audiences
- Create proper framing to get attention (in schools) and stand out among other orgs (for funders/donors)
- Create more testimonials
- Bring mission to life

Infrastructure

Secure funding for a sustainable future

- New grants
- Individual cultivation (e.g., site visits, volunteer days)
- Corporate funding through HR/EAGs
- Earned revenue (schools)
- Stable funding and a healthy reserve

People

- Expand board (11-15 members?)
- Create Young Professionals board
- Retain staff; upgrade HR function
- Retain volunteers

Facilities and Partnerships

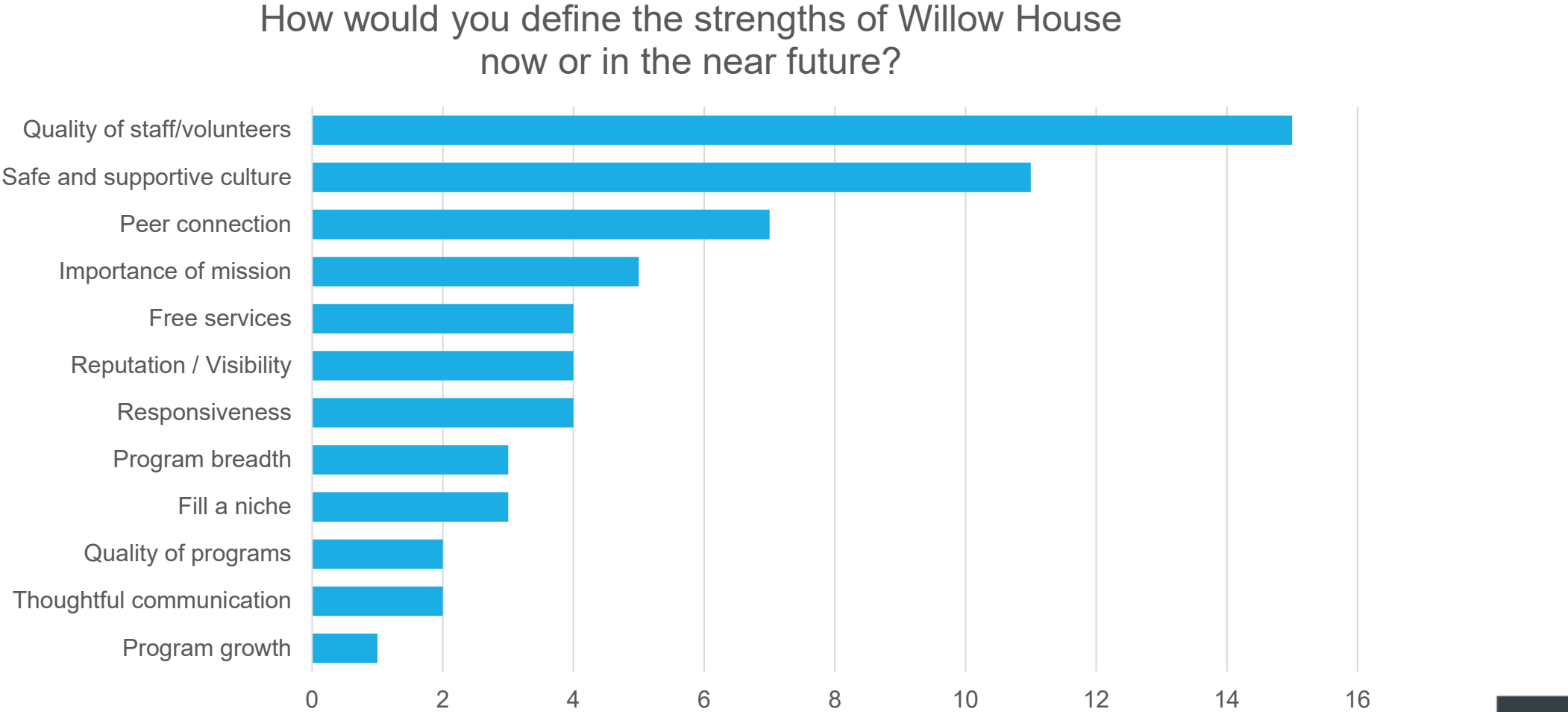
- Relocate in a way that is affordable and allows for growth
- Clarify relationship with LBGC

SWOT analysis

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> • Quality of staff/volunteers • Safe and supportive culture • Peer connection • Importance of mission • Free services • Reputation / Visibility • Responsiveness • Program breadth • Fill a niche • Quality of programs • Thoughtful communication • Program growth 	<ul style="list-style-type: none"> • Community awareness • Funding • Summer break • Lack of strategic direction • Frequency of meetings • Geographic diversity • Quality of programs • Setting expectations for first-time participants • Child/Teen involvement at SOS and homicide groups • Holiday event timing • Number of volunteers • LBGC partnership • Employee role clarity • Harsh lighting 	<ul style="list-style-type: none"> • Expand through partnerships • Get the word out about WH • Raise more money – corporate, earned revenue • Serve more people • Expand geographically • Add targeted support groups • Increase child/teen participation in SOS • Invite SOS families to FPS groups • Engage and create pathways for volunteers • More frequent meetings/events • Activate board networks • Optimize LBGC partnership 	<ul style="list-style-type: none"> • Funding • Economy • Political headwinds • Lack of volunteers • Lack of marketing • Staff turnover • Guaranteeing anonymity • Competition

Source: Willow House survey 2025 (n=32)

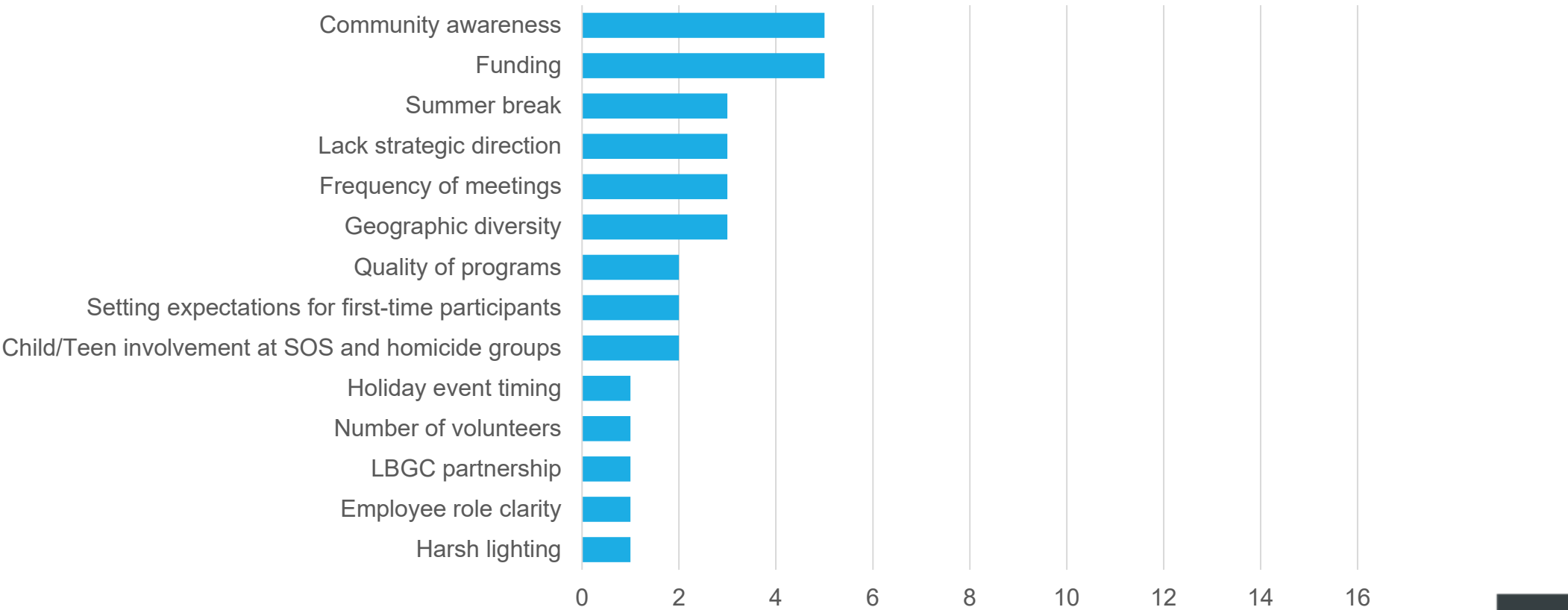
Strengths



Source: Willow House survey 2025 (n=32)

Weaknesses

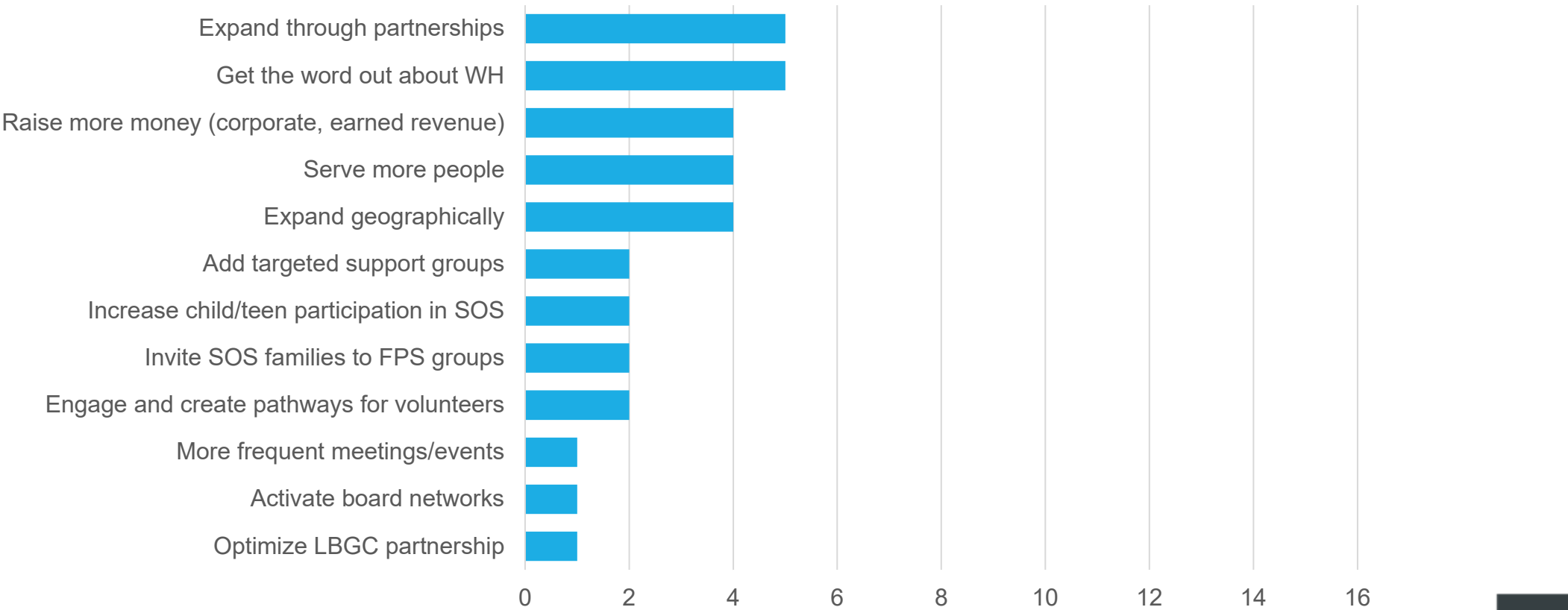
How would you define the weaknesses of Willow House now or in the near past?



Source: Willow House survey 2025 (n=32)

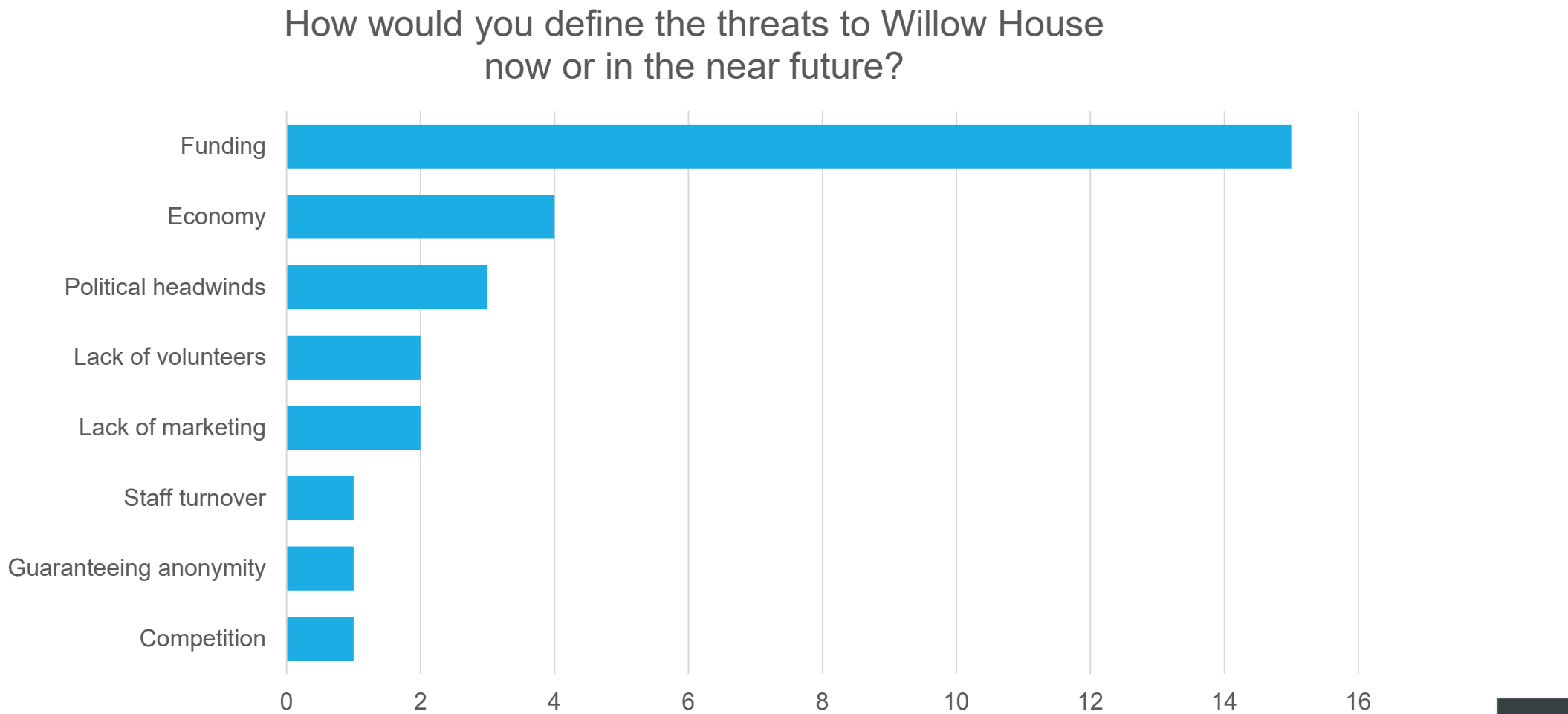
Opportunities

How would you define the opportunities available to Willow House now or in the near future?



Source: Willow House survey 2025 (n=32)

Threats



Source: Willow House survey 2025 (n=32)