

SIMON'S Heart

Strategic Plan 2025 – 2028

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Strategic Priority (Programming)	Goal <i>By the end of the plan, we will have</i>	Objectives <i>To achieve this goal, we will</i>
Advance Scalable, Revenue-Generating and Impact-Driven Programs	CPR Jukebox Tour is fully resourced, piloted and positioned to scale	Secure experiential marketing partner, identify events and create impact metrics for each Position CPR Jukebox as an activation for a national partner, solidify licensing opportunity and secure brand.
	CPR Jukebox Marathon is embraced by high school and college students and becomes our most visible and profitable event.	Position the Marathon as a scalable, youth-centric event by enabling peer-to-peer fundraising, maintaining current sponsors, enticing new ones and raising awareness via media campaigns.
	HeartBytes is a go-to resource to facilitate heart screenings, youth sports physicals and robust pediatric research.	Position HeartBytes as a standard of care in the student athlete and heart screening space by piloting institutional use measuring outcomes, and securing licensing partnerships.
	GotAED is as an agile platform for high-impact awareness and donation campaigns.	Maintain GotAED as a story-driven, accessible national platform that facilitates awareness and equitable AED access with minimal lift. Seek 1–2 high-visibility brand partnerships per year.

Strategic Priority (Funding)	Goal <i>By the end of the Plan we will have</i>	Objectives <i>To achieve this goal, we will</i>
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Earned Revenue	Developed sustainable revenue for CPR Jukebox Tour via licensing and sponsorships	Create licensing and sponsorship models, secure partners and establish and track metrics.
	Developed sustainable revenue for HeartBytes via licensing and sponsorships	Create licensing and sponsorship models, secure partners and establish and track metrics.
	Developed sustainable revenue for GotAED via transactions and sponsorships	Create sponsorship model, secure partners and establish and track metrics.
Signature Event	Launch CPR Jukebox Marathon as a marquis fundraising and awareness event	Position the Marathon as a flagship P2P and sponsorship vehicle that engages youth, activates communities and raises unrestricted revenue
Other Events	Analyze the benefits and detriments of other events like Simon Says Golf and Conshy Classic	Engage in discussion with planners of Classic and explore financials of golf.
Grants & Philanthropy	Build recurring grant and foundation support	Collaborate with HeartBytes insitutional partner to secure funding from philanthropists, foundations and grants
Strategic Reserve	Responsibly invested portion of \$400K to validate and grow scalable revenue models	Deploy reserve to advance Jukebox, HeartBytes (not GotAED) to invest in talent, tech and pilot partners

Strategic Priority (Governance)	Goal <i>By the end of the Plan we will have</i>	Objectives <i>To achieve this goal, we will</i>
Strengthen Board Culture and Accountability	Established shared norms and accountability systems that promote consistent engagement and responsibility.	Adopt Rules of Engagement, launch self-assessments and meeting surveys, and empower the Vice Chair to lead accountability.
Activate Committees to Increase Capacity and Strategic Involvement	Launched five fully staffed committees with board and external members delivering tangible outcomes tied to strategic goals.	Recruit external members, hire an executive assistant and ensure committees meet one clear goal per year.
Improve Governance and Leadership Continuity	Established clear board officer election processes and ensured staggered transitions for leadership roles.	Launch annual nomination process, orient new members and maintain a board composition plan.
Clarify Leadership and Oversight Structure	Successfully operated under a nontraditional governance model without an Executive Director. Each initiative has its own program leader and worked with the Board.	Document roles, responsibilities, and communication flows between Program Leaders and the Board.