

METROWEST HEALTH FOUNDATION

March 2013

Dear Colleague:

A recent article in the Stanford Social Innovation Review declared the strategic plan dead. The article didn't propose doing away with planning, rather it made the case that today's turbulent times require organizations to be more adaptive in their planning – create a vision, learn as they go and make corrections along the way in order to achieve maximum results.

At the foundation, we believe good planning is fundamental to our work, and ultimately how we can best be a resource for improving the health of the region. It is why we take time every couple of years to review our progress and chart new directions for our grantmaking and program activities.

Last September, we began such a planning process using consultants from the Bridgespan Group. We undertook a systematic review of our programs and grants with an eye toward identifying where we could have an impact going forward. The process included analysis of local health data and more than 55 interviews with community leaders, grantees and others in our field to ensure that we had a solid understanding of the needs of the region. This process culminated with a new strategic plan recently approved by the foundation's board of trustees. A summary of the plan is attached.

This plan builds on our past accomplishments by continuing a portfolio approach to grantmaking that includes targeted, responsive and community capacity building initiatives. Our targeted initiatives will focus on three areas, **Access to Care**, **Healthy Aging** and **Adolescent Health**. In each of these areas we will set clear measurable objectives so that we can track our progress and make corrections along the way.

Our success in implementing this plan will depend on finding the right partners who share our passion for addressing these issues. We hope you will review the plan and give some thought to how you and your organization can join us in this work. We also value your continued feedback as we move forward with implementation.

Sincerely,

Martin Cohen

President

**Summary of the Foundation's
Five-Year Strategic Plan
2013-2017**

The MetroWest Health Foundation is working in the 25 communities of the MetroWest area of Massachusetts. Our mission is “improving the health status of the community, its individuals, and families through informed and innovative leadership.” For more than a decade, we have invested in critical health issues, including access to health care, adolescent substance abuse and bullying, healthy aging, and childhood obesity. Through this work, the foundation has focused on the needs of the region’s most vulnerable residents. We have also worked to rally the community around pressing health issues, helped local health organizations increase their skills and capabilities, and gathered a robust community health data set to identify and address gaps.

During the fall of 2012, the foundation began a new five-year strategic planning process. Through this process, we reviewed internal data and gathered comments and suggestions from approximately 55 community stakeholders. Interviewees included a diverse group of community members, board trustees, Leonard Morse and Framingham Union grants panelists, and grantees. Grounded in this feedback and analysis, the foundation will build on our past investments and successes to further improve the health of MetroWest communities, especially the health of the most vulnerable residents.

At a high level, the Foundation will:

- Continue our portfolio approach, which includes targeted initiative grantmaking programs, responsive grantmaking, and community capacity initiatives. “Targeted” initiatives are a small number of multi-year efforts in areas that the foundation and community members have identified as critical to the health of the region’s residents. “Responsive” grants provide short-term funding to meet other community health needs, and “community capacity” initiatives enhance the abilities of leaders, organizations, and communities to more effectively address regional health needs. This approach reflects a desire to invest strategically in targeted areas to create broader social change, while creating space to respond to other community health needs.
- Seek to make a measurable difference within targeted grantmaking programs. The foundation has set clear, specific objectives for each program area and will foster regional activity to accomplish them. Ultimately, we will not know if we are improving the health of MetroWest residents if we do not measure our progress.
- Maintain our targeted grantmaking programs in three areas: Access to Care, Adolescent Health, and Healthy Aging. These initiatives reflect stakeholder feedback on the high need within each area, the availability of evidence-based approaches, and the ability to benefit from knowledge built in these areas over time. Though the foundation has historically invested in childhood obesity, this will no longer be a targeted area for two primary reasons: many other funders are now focused on this issue, and not enough is known about what specific approaches can reduce childhood obesity. However, we will continue investing in this area through responsive grants and leadership of the MetroWest Childhood Healthy Weight Task Force.

The Foundation will make targeted grants in three specific areas:

- **Access to Care:** For most of us, when we think of health and healthcare, we likely think of a doctor or other type of provider such as a nurse practitioner. And rightfully so, since having regular checkups is associated with better health. Unfortunately, there are simply not enough providers in the region, especially those willing to serve low-income patients, to meet the demand for primary and preventative care. Additionally, though every legal resident in Massachusetts is technically guaranteed health insurance, burdensome paperwork makes registering for coverage complex. As a result, some residents still lack insurance. To help ensure that MetroWest residents have access to care, the Foundation will invest in programs and institutions that serve the health care needs of minorities and other vulnerable populations, including targeted community outreach programs. The foundation will also help to increase the number of residents with health insurance coverage, with a focus on the Spanish and Portuguese-speaking communities.
- **Adolescent Health:** As any parent can attest, adolescence is a tumultuous time in a child's life. The threats to the health of adolescents are not generally diseases or chronic conditions, but rather accidental injury from risky behaviors. We can likely all reflect back on a time in high school where we made poor decisions to the detriment of our own health or the health of others. To help adolescents avoid risky behaviors, the foundation will continue to invest in school-based programs while adding more comprehensive programs that focus on students' mental health. The region's schools have prioritized mental health as a need, and the foundation has identified a number of high-quality programs that will be able to improve the mental health of MetroWest adolescents.
- **Healthy Aging:** Our population of 65 and older residents is expected to increase by 50 percent over the next 20 years. It is imperative that the region seeks creative solutions to support the healthy aging of our residents. The elderly face many challenges, but three most cited by regional stakeholders who know this population are a lack of transportation, social isolation, and insufficient caregiver supports. To help meet these needs, the Foundation will invest in flexible, low-cost transportation, increased engagement opportunities to prevent isolation, and services to provide caregivers with the support they need to provide high-quality care.

To help ensure success over the next five years, the foundation will:

- Be flexible and open minded to funding a variety of approaches that help achieve our desired outcomes in Access to Care, Adolescent Health, and Healthy Aging. While we have put forward potential strategies in this plan based on the evidence base, we realize these strategies are not exhaustive.
- Evaluate our strategies and their effectiveness on an annual basis. This will help ensure that we are learning over time and adapting our approach to have the greatest impact.
- Communicate with our nonprofit, government and funding partners to ensure that our work remains connected to the needs of our 25 communities.

The foundation looks forward to our next five years in service of the region's health. We will build on a strong platform of 14 years of experience to address the key needs identified while remaining flexible to meet unforeseen needs in the years to come.

For more information about the foundation and these initiatives, please visit our website at www.mwhealth.org or contact us at 508-879-7625.