Consumer Health Foundation

Strategic Plan
2014-2016
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EXECUTIVE SUMMARY

The Consumer Health Foundation’s strategic plan reflects both continuity and change. We remain committed to our core values of consumer voice and engagement, equity and social justice, health care for all, partnerships, innovation and risk taking, shared learning and accountability. We will continue to address the lack of access to high quality affordable health care as well as the social determinants of health. By social determinants, we mean the many aspects of a society that enable people to thrive—a living wage job; affordable housing in a safe neighborhood; access to quality and affordable food, reliable transportation, educational opportunities and extensive social networks; and freedom from discrimination in all of its forms, both personally and institutionally.

Over the past five years, CHF has focused its grantmaking resources on advocacy to create systems change in a number of these areas within our health care access and health justice portfolios. We believe that funding advocacy is critical to achieving our mission. Moving forward, we will maintain these portfolios; however, we will focus on two programmatic priorities in alignment with our updated spending policy (see page 6). These programmatic priorities include:

- A focus on advocacy for economic justice (see page 3 for more detail) in order to stem the tide of rising income inequality in our region. One of the most important and enduring relationships, documented in public health research, is that between low income and poor health.
- A focus on advocacy for health reform, due to the changing health policy landscape (see page 3 for more detail). This portfolio will not only focus on health reform implementation but also the factors that will support health system reform, such as the cost of care and consumer engagement.

We believe that these two programmatic focus areas afford us the greatest opportunity to achieve health equity, which we define in two ways. The first is a goal oriented definition: the absence of systematic disparities in health (or in the major social determinants of health) between social groups who have different levels of underlying social advantage and disadvantage. The second is a process: the assurance of the conditions for optimal health for all people, which requires valuing all individuals and populations equally, rectifying historical injustices, and addressing contemporary injustices by providing resources according to need. In addition, the Foundation has an explicit commitment to racial equity which we define in the context of health as a goal and a process whereby people of color have an equal opportunity to live a healthy and dignified life.

CHF’s updated spending policy is designed to better assure perpetuity, and the Board of Trustees and staff of the Foundation are committed to seeking out revenue generation opportunities as a strategy to bring new and increased funds to the work and that of our nonprofit partners. These opportunities will be both mission-aligned and capable of attracting investments from new partners.

Along with these more significant changes, we have made clearer our commitment to two areas of work: mission-consistent investing and strategic communication to advance racial equity. See page 7 for our revised logic model and theory of change, which highlight these changes.

We are grateful to those who provided input as we deliberated, and we look forward to working with you as we seek to implement this plan and advance health in our region.

2 Jones, Camara as quoted in Grantmakers in Health (2012). Striving for health equity: Opportunities as identified by leaders in the field.
THEORY OF CHANGE

The Consumer Health Foundation envisions a region and a nation in which everyone has an equal opportunity to live a healthy and dignified life. By “everyone,” we mean all people regardless of race, ethnicity, immigration status, gender identity, sexual orientation, disability, age, education, or income. Our mission is to advocate for health and racial equity through programs and investments that advance the health and well-being of low-income communities and communities of color in the District of Columbia, parts of suburban Maryland, and Northern Virginia.

Our programs – grantmaking and capacity building, strategic communication, strategic partnerships, and mission-consistent investing – are focused on contributing to the following changes:

- Community members are organized and effective advocates for their own health and the health of their communities.
- Regulations, policies and programs are protected or advanced that lead to more effective and equitable labor laws and opportunities for worker advancement.
- Health and other public benefit programs have adequate and sustained funding and are implemented effectively and equitably.
- Emerging and innovative approaches to creating an equitable economy are implemented and sustained.

Our theory of change suggests that these changes will lead to people of color and people with low income having access to quality and affordable health care and more opportunities to increase their income and wealth that together enhance their ability to live healthy and dignified lives.

We believe that our grantee partners, other nonprofit organizations and foundations are essential partners in achieving our vision and mission.

A graphic depicting our theory of change can be found on page 7.
PROGRAMS

Grantmaking and Capacity Building

We believe that funding advocacy is critical to achieving our mission. Health inequities are created and reproduced by policies and systems. Advocacy for local, state, and regional policy change and systems reform is essential to achieve the change we envision.

The Foundation defines "advocacy" as efforts to create local, state and regional policy change and systems reforms that benefit low-income communities and communities of color in the Metropolitan Washington, DC region. Activities could include community engagement and organizing among residents in low-income neighborhoods, development of policy recommendations, policy implementation and monitoring, budget and policy analysis, coalition or network building, convening, stakeholder engagement and collective problem solving among diverse groups, campaigns, media and communication.

The Foundation will focus on two grantmaking areas, namely:

- Ensuring access to quality health care with a focus on advocacy for health reform
- Advancing health justice with a focus on advocacy for economic justice

**Health Care Access: Focus on advocacy for health reform**

CHF believes that reforming the health care system continues to be an important area of work. The Affordable Care Act has created opportunities for advocacy, including Medicaid expansion, new health insurance coverage options, community benefit regulations, and consumer education. It has also opened up new funding opportunities, including support for community health centers and the community transformation grants focused on prevention. We believe that CHF’s strategic direction should include a focus on health reform within the context of this changing health policy landscape. Health reform advocacy will include support for policies that promote health equity and health care coverage and access and address health care program financing, sustainability, cost of care and budget and revenue.

**Health Justice: Focus on advocacy for economic justice**

CHF operates on the overwhelming evidence that health and income are interconnected. Therefore, CHF’s strategic direction will include a focus on economic justice. Economic justice advocacy, for us, will include support for policies related to workers’ rights, such as labor laws, wage and hour laws, living wage standards and benefits as well as workforce development and career advancement for those members of our community who are unemployed and underemployed.

**Field Building Approach to Advocacy Grantmaking and Building a System of Advocacy**

We will prioritize a field building approach to our advocacy grantmaking, designed to create and sustain a group of organizations that are able to engage in political environments and develop policy recommendations in the areas
of health reform and economic justice. This “system of advocacy” requires strong networks of organizations that are using various strategies and have different capacities. These capacities include the ability to: build a strong grassroots base of support, analyze legal and policy issues, develop media and communication strategies, build and sustain strong, broad-based and diverse coalitions and alliances, and generate resources to accomplish these goals. CHF will work with grantee partners and other nonprofit organizations to identify the gaps in skills and other areas that will help strengthen the field (i.e., the field of health reform advocacy and economic justice advocacy). The goal is to help build the capacities of communities and the field to effect changes at the systems level.

In practice, CHF may consider tactics such as adopting collaborative approaches to funding, hosting convenings with advocates to map strategy, and aligning grantmaking with other funders that may be supporting organizations beyond those supported by CHF.

**Innovations/Special Projects.**

In addition to our core advocacy funding, the Foundation will focus its grantmaking and capacity building support on two areas – community wealth building and racial equity.

**Community Wealth Building**

Increasingly, we are learning that wealth may be even more important than income in sustaining health and well-being of individuals and communities. In addition to advocacy for economic justice, which seeks to create changes in the current economic system, we are interested in seeding emerging and innovative approaches to creating an equitable economy. This could take the form of employee-owned cooperatives or other community wealth building approaches.

**Racial Equity**

The Foundation defines “racial equity” as both a goal and a process whereby people of color have an equal opportunity to live healthy and dignified lives. We will support initiatives and programs that will advance racial equity in organizations, coalitions or alliances.

**Strategic Communication**

The Foundation will build on our communication work to further advance our efforts around health and racial equity. Our strategic communication seeks to raise awareness and support action toward racial equity and will also highlight the racial equity dimensions of health reform and economic justice. We will identify opportunities in partnership with nonprofit organizations and foundations to raise the awareness of the impact of racism on communities of color and organize convenings that focus on racial equity. We will use different methods to accomplish this goal such as annual meetings, reports and social media.

**Strategic Partnerships**

The Foundation believes that strategic partnerships are essential to achieving our mission. Partnerships with foundations have allowed us to address social determinants of health such as workforce development, food systems, and community wealth building. We will continue to build and participate in strategic partnerships that allow us to advance our work on health reform, economic justice and racial equity.
Mission-Consistent Investing

Foundations are legally required to spend a minimum of 5% of their assets annually on charitable activities, with an additional 1-2% spent annually on non-charitable operations. Foundations are also expected to invest their endowed assets prudently—seeking a reasonable return at a reasonable risk. While attention is naturally focused on a foundation’s charitable spending, more and more frequently foundations are asking whether a more strategic investment of the endowment can further the foundation’s mission. The Foundation will build its expertise in mission-consistent investing and do more to align its investments with its mission to advance health and racial equity in the region.

Evaluation

We will develop an evaluation framework for all of our programs—grantmaking and capacity building, strategic communication, strategic partnerships, and mission-consistent investing. The evaluation framework will help the Foundation identify progress toward achieving the intended changes in each program area. For the grantmaking and capacity building program, the Foundation will collaborate with grantee partners in developing the evaluation framework.
The collapse of the financial markets in 2008 had an unprecedented impact on our national economy, our local community and the Consumer Health Foundation’s assets. CHF’s investment portfolio lost roughly 28% of its value, falling from $42 to $28 million, a percentage decline consistent with peers nationally based on studies from the Foundation Center and the Chronicle of Philanthropy.

The Foundation made an intentional decision on an annual basis, through its budgeting process, to hold its spending flat in the five years (2009-2013) following the 2008 collapse. CHF wanted to be responsive to the community at a time of uncertainty and financial duress.

However, the slow recovery of the market, coupled with an intentionally aggressive spending rate (currently at 12%), has had an impact on the Foundation’s endowment. The CHF Board of Trustees adopted a policy to reduce CHF’s spending rate relative to the three-year moving average of the Foundation’s assets by 1% each year for five consecutive years, starting at 11% in 2014. The goal is to move to a 7% spend rate by the end of a five-year period and align our programmatic resources with these reductions. This more incremental approach will provide time for the Foundation to explore and pursue revenue generation strategies designed to bring new dollars to support our work to advance health and racial equity in the region.
We envision a region and a nation in which everyone has an equal opportunity to live a healthy and dignified life. By “everyone,” we mean all people regardless of race, ethnicity, immigration status, gender identity, sexual orientation, disability, age, education or income.

The mission of the Consumer Health Foundation is to advocate for health and racial equity through programs and investments that advance the health and well-being of low-income communities and communities of color.

People of color and people with low income have access to quality and affordable health care and more opportunities to increase their income and wealth that together enhance their ability to live a healthy and dignified life.