

Moving Forward: A Strategic Plan for

THE WESTERN MARQUETTE COUNTY HEALTH FOUNDATION



BACKGROUND

The Western Marquette County Health Foundation (WMCHF), previously known as the Bell (Hospital) Foundation, was created approximately five years ago upon the completion of the sale of the Bell Hospital. Funds from the sale were given to the foundation, which is dedicated to providing funding for health and wellness solutions for the communities located in Western Marquette County.

Since its inception, the WMCHF board has annually been awarding approximately \$30,000 in each of two annual grant cycles to non-profit organizations for health and wellness-related projects and programs. The WMCHF board additionally allocates approximately \$12,500 annually to each of the four school districts located in Western Marquette County- Negaunee, Ishpeming, Westwood, and Republic-Michigamme. The board also allocates \$10,000 annually in the form of a matching grant for the Teal Lake Swim: Benefit for Diabetes.

The Western Marquette County Health Foundation is governed by a board that currently has ten members. After sharing administrative time with an employee of the Negaunee-Ishpeming Chamber of Commerce, the board recently hired a part-time Foundation Manager whose time is dedicated solely to the WMCHF.

After five years of operation, the board of the Western Marquette County Health Foundation retained the services of Simply Superior Consulting to conduct a strategic study that will provide direction moving forward.



THE PROCESS

Small-group Discussions

Between June and August, 2018, Rachel Harris and Dave Bonsall from Simply Superior Consulting conducted seven small-group discussions involving approximately 35 Western Marquette County residents that included non-profit organization leaders, grant recipients, health professionals, government officials, educators, and long-time residents.

Discussion Centered on the Following *Appreciative Inquiry* Questions:

1. Do you know about the Western Marquette County Health Foundation? What do they do? Do you feel that your friends and neighbors know about the WMCHF?
2. What do you feel are the most pressing health issues in your community? Which health services and new programs are most needed in your community?
3. Do you think funding for youth health services and programs should be a priority? Are you aware of the financial support that the Western Marquette County Health Foundation gives to the four school districts in Western Marquette County? What should it be?
4. How can the Western Marquette County Health Foundation best be promoted to potential grant recipients? How can the foundation best be promoted to members of your community so that there is an understanding of what it is and what it has the potential to do?
5. What has to happen for people in your community to feel as though they have a vested interest in the Western Marquette County Health Foundation in order to support it and rely upon it to promote and financially assist with needed and beneficial health services and initiatives?
6. Do you think the Western Marquette County Health Foundation should continue to undertake new fundraising events? Are you aware that the WMCHF needs to raise \$30,000-\$40,000 every year to maintain its Public Charity status?



THE PROCESS

7. Five years from now if the Western Marquette County Health Foundation is doing everything you would like it to do in your community what will it be supporting and promoting to improve the health of residents?

Additional Question for Current and Potential Foundation & Service Club Contributors:

How can WMCHF partner with and collaborate with your organization to have a greater impact?

Additional Question for WMCHF Grant Recipients: What has been your experience with the grant-seeking process? Do you have suggestions for improving it?



THE THEMES

The following themes were formed from the thoughts and ideas that were frequently expressed by participants in the small-group discussions when responding to the *Appreciative Inquiry* questions.

1. **Make a concerted effort to increase the visibility of the WMCHF.** While most non-profits are aware of the WMCHF, many participants felt that few people in general are aware of it and fewer still are aware of its mission. Visibility can lead to additional input on health-related projects and increased support and participation in those that are funded. There is also the potential for increased financial support as a result of greater awareness of what the WMCHF is and has the potential to accomplish. A thought that was expressed was that having a dedicated Foundation Manager position will result in greater visibility.
2. **Determine which health and wellness issues are going to be priorities for the Western Marquette County Health Foundation. A myriad of health and wellness concerns were articulated.**

There are multiple concerns with youth including neonatal care, trauma, mental health, depression, anxiety, bullying, dysfunctional family life, child abuse, foster care, suicide, obesity, lack of motion, local access to child psychiatric services, substance abuse, and boredom/lack of activities-especially in the summer. Transportation was mentioned as an overriding factor that affects many of these issues.

There are concerns with the elderly including isolation, transportation, arthritis, blood pressure, access to physical therapy, dementia, cancer, obesity, diabetes, mental health and difficulty in accessing proper care.

Adults of all ages have challenges that include mental health, addictions, tobacco use/ lack of enforcement in tobacco-free areas, domestic violence, and obesity. Lack of preventative care is a major concern.

Youth and adults are negatively impacted by the lack of affordable health care and the absence of health insurance because of the high cost.



THE THEMES

3. **Maintain youth health-related programs and services as a priority.** There was overwhelming support for this. As one participant put it, if young people develop healthy lifestyles, many of the adult health-related issues are greatly reduced. Another advocated for putting the available funds in counseling/mental health resources in the schools vs. athletics, feeling booster clubs, etc. support sports. Guidelines should be established for funding usage and an annual report that includes the measurement of the resulting impact should be established. Outcomes, including the number of students impacted, have to be marketed. Possibly include site visits. Should positions be funded?
4. **Establish a funding philosophy.** Should a larger number of projects be funded at a modest level vs. funding a few initiatives more substantially for greater impact? Can a balance be struck with maybe one or two more expensive projects and several more modest projects? Sustainability over a period of years is a concern. A suggestion was to have a funding theme or two for a period of years. A guideline that defines the number of consecutive years that grant funds can be requested by the same organization/project should be established. Developing a consistent “elevator speech” for the funding philosophy might be helpful for board members and the Foundation Manager.
5. **Consider changing the name and the logo for the WMCHF.** The feeling is that the name is too long and cumbersome to be memorable and the logo doesn’t “pop” and create immediate recognition.
6. **Keeping current with emerging health and wellness issues and approaches should be a priority for board members.** This can be accomplished through regular communication with school officials, health care professionals and grass-roots citizens. Health and wellness-related surveys and studies should be reviewed.
7. **Explore ways to increase available funds.** While current funding is appreciated, the needs are great and available resources are at a modest level. Some asked if more money could be allocated every year. Other thoughts were to solicit additional funds for the foundation principal through major grants, and quietly solicit bequests. Should the WMCHF remain a public charity or become a private foundation?



THE THEMES

8. **Work with the Superior Health Foundation, the Portage Health Foundation, the Blue Cross Blue Shield Foundation of Michigan, and other health-related foundations on joint health and wellness initiatives.** Leveraging financial assets with other health-related entities would be a way of increasing impact with current resources. By aligning themes, this could become a regional organization.
9. **Build or encourage coalitions between multiple organizations seeking grants from the Western Marquette County Health Foundation around a single pre-determined initiative.** This would be another way of maximizing impact on a health or wellness priority issue.
10. **Attention should be paid to processes and professionalism.** One grant recipient was not invited to the awards ceremony. Another shared that a check was received in the mail without notification that their grant application was successful. Program evaluation should be a high priority.
11. **Serve as ambassadors for the Western Marquette County Health Foundation.** Participants feel that the Foundation Manager and board members are well-known in the community and they can informally promote the foundation in the coffee shops, at civic clubs, and within their daily interactions with community members. A suggestion would be to discuss upcoming events as a regular agenda item at board meetings and determine who can “represent” the board.

Creative/Innovative Ideas

In addition to the themes, the small-group discussions yielded a number of creative/innovative ideas. Several of them were transformed into objectives that will contribute to goal accomplishment.



THE PLAN

On Friday, August 24, the Western Marquette County Health Foundation Board and the Foundation Manager met with Rachel Harris and Dave Bonsall to construct a strategic plan. Information gathered through the small-group discussions served as the foundation for the plan that emerged.

Name Change

Members of the board and the Foundation Manager were in agreement with the theme recommending a name change for the foundation. After discussion, a motion was made, seconded, and approved to take the appropriate steps to change the name from Western Marquette County Health Foundation to:

West End Health Foundation.

For the remainder of this report, the foundation will be referenced as the ***West End Health Foundation.***

Mission Statement

The West End Health Foundation Board and the Foundation Manager critically examined the existing Mission Statement which read: **“The mission is to provide funding for health and wellness solutions in Western Marquette County.”**

After suggestions and ensuing discussion, the Mission Statement was revised and now reads as follows: ***Advancing health and wellness in the West End community.***

Vision Statement

The West End Health Foundation Board and Foundation Manager crafted a Vision Statement for the first time to serve as a tool that will focus and direct foundation efforts. Input and the resulting discussion led to the following Vision Statement: ***To build a culture encouraging healthy lifestyles in the West End.***



THE GOALS

The West End Health Foundation Board and the Foundation Manager utilized the Themes and Creative/ Innovative Ideas to formulate the following four goals with corresponding objectives:

Goal #1. To develop a communications plan. This will be accomplished by:

- Reviewing the Visibility/Promotion items expressed in the Creative/Innovative Ideas (All).
- Scheduling a board work session in November to develop a comprehensive plan (All).
- Making communication updates/opportunities a regular board agenda item (Pam Christensen).

Goal #2. To increase “top of mind” awareness of what the West End Health Foundation is. This will be accomplished by:

- Creating a new foundation logo to coincide with the name change (Tammy via Pam Roose; September).
- Promoting West End Health Foundation school assistance at Negaunee, Ishpeming, Westwood, and Republic/Michigamme high school athletic events via banners/programs/ public address announcements (Tom Edmark; by September).
- Serving as ambassadors at civic club and community organization meetings and activities (All; on-going).
- Distributing publications that include rack cards and annual reports (Pam Christensen; on-going)
- Updating the web site and social media presence (to be hired out and coordinated by Pam Christensen; by December).
- Formalizing the health foundation name change (Kori Tossava and Pam Christensen; by September).
- Developing and implementing a “roll out” campaign for the new West End Health Foundation name, logo, mission and vision statements (All; by November)
- Conducting a Business After Hours as a roll out event (Paul Bonetti and Tom Edmark; tentatively for November 1 at the Golf Club)



THE GOALS

Goal #3: To establish a funding philosophy. This will be accomplished by:

- Reviewing information from the Michigan Community Health Needs Assessment and other sources on a regular basis (coordinated by Kevin Piggott; on-going).
- Developing a proposed funding philosophy for 2019 (Grants Committee/ full board; by December).
- Developing proposed parameters and outcomes for school funding (Grants Committee/ full board; by December).
- Considering “special consideration will be given to” language in grant announcements for requests that address health and wellness priorities (full board; by December).
- Considering a move to an annual grant cycle vs. the current semi-annual cycles (All; by December)

Goal #4: To increase grant funding and to leverage funds available. This will be accomplished by:

- Reviewing the investment policy to determine the amount of money that can be safely distributed (Tom Edmark/ full board by September).
- Continuing to build coalitions with health and wellness-related foundations (All; on-going)
- Coordinating a meeting with related non-profit organizations (Pam Christensen; November).
- Coordinating a meeting with health and wellness-related foundations (Pam Christensen; by January, 2019).
- Joining the Council of Michigan Foundations (Pam Christensen; by November).
- Attending the Non-Profit Conference (Pam Christensen and board members interested in attending; October)
- Exploring matching grants and other funding sources with grant seekers (Grants Committee/ full board; on-going).
- Exploring funding coordination with the Bell Hospital Auxiliary (Pam Christensen; by December)



THE CONCLUSION

We are impressed with the expertise and commitment present in the West End Health Foundation's Board and Foundation Manager. The board's commitment was illustrated by their decision to pause, reflect, and undertake a strategic planning process after five years of operation. The boards and Foundation Manager's expertise and willingness to engage was on display during the time that was required to craft the strategic plan.

The West End Health Foundation Board and the Foundation Manager have constructed a strategic plan that is bold, exciting and yet realistic. Follow through will be critical, but when implemented this plan will do much in positioning the West End Health Foundation to have the impact that is desired and is illustrated in the Vision Statement that now guides decisions moving forward.

