

MICHIGAN HEALTH
ENDOWMENT FUND

Strategic Plan 2021-2025

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INTRODUCTORY LETTER

Since giving our first grants in 2014, we've awarded over \$190 million to improve the health of Michiganders, with a special focus on children and older adults. We are grateful for funding by Blue Cross Blue Shield of Michigan, a dedicated board, and extraordinary staff. While we are immensely proud of the impact we've had in these early years, the Michigan Health Endowment Fund is still in its relative youth.

As we write these words, the impact of the COVID-19 epidemic has reached every corner of our state, interrupting students' education, disrupting our workplaces, straining our healthcare systems, and resulting in over 17,000 lives lost to date. We see the disproportionate impact the pandemic has had on communities of color, elderly people, and those without sufficient access to quality healthcare. Tragic events rooted in racial bias and discrimination have sharpened our focus on health disparities experienced by people of color and all who are disadvantaged.

In many ways, the events of 2020 have forced us to "grow up quickly." As challenging as this year has been, it has also amplified our mission—and our core belief—that every Michigander deserves an equal opportunity to pursue a healthy, happy, and productive life.

Solving health disparities cannot be a "zero-sum game," where some are winners, and some are losers. Collaborating with community and statewide partners, we must strive to bring everyone up and ensure that no one is left behind by virtue of their socioeconomic status, race, ethnicity, geographic location, age, gender, sexual orientation, or disability.

This document outlines how our philanthropic investments are focused on driving the advancement of health through quality of care, access to care, prevention, and well-informed health policy. We are committed to discovering new solutions—and expanding proven solutions—to decrease health disparities and improve the health of all Michiganders. We will continue to invest in discovering and scaling solutions, informing health policies, and improving systems so that everyone can benefit from better health.



SUSAN JANDERNOA
BOARD OF DIRECTORS CHAIRPERSON



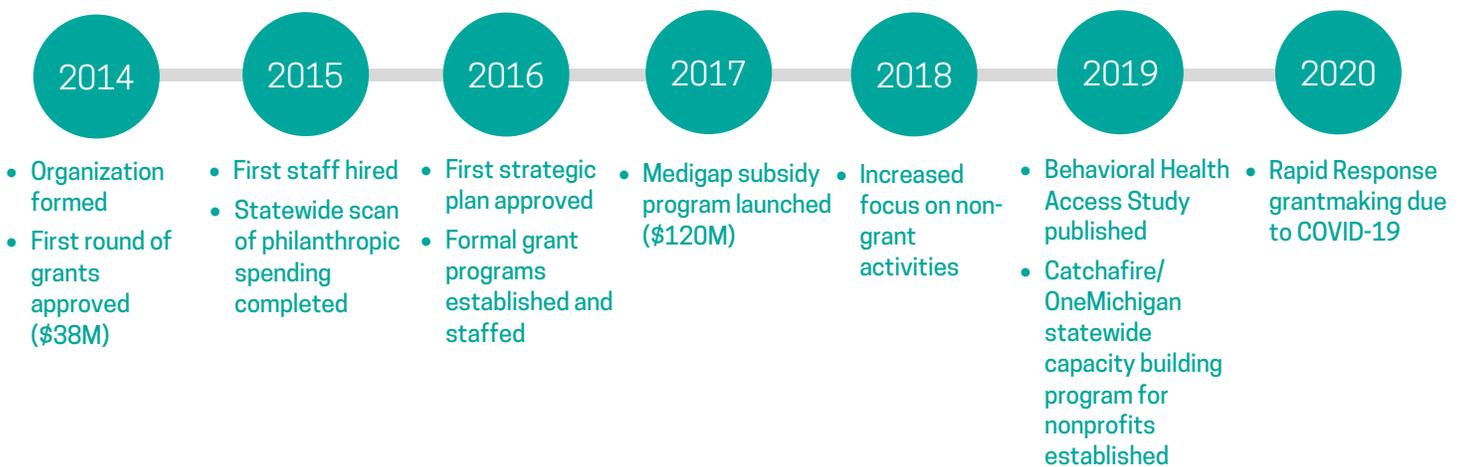
PAUL HILLEGONDS
CHIEF EXECUTIVE OFFICER

HEALTH FUND BACKGROUND

The Michigan Health Endowment Fund, or the Health Fund for short, was established with the passage of Public Act 4 of 2013, which required Blue Cross Blue Shield of Michigan to provide up to \$1.56 billion over 18 years to a health endowment fund that benefits Michigan residents. The authorization specified that the fund should focus on children and seniors, with funding in eight areas:

- Behavioral health
- Health services for foster and adopted children
- Access to healthy food
- Wellness and fitness
- Infant mortality
- Technology enhancements
- Health-related transportation
- Foodborne illness prevention

In 2015 the Health Fund Board of Directors, composed of nine individuals appointed by the governor, hired the first staff. The following year, the organization adopted its first strategic plan, which can be [viewed here](#). Early milestones are noted in the timeline below.



This strategic plan seeks to build on the solid foundation established by the founding board and staff with a focus on: balancing the joint-aims of serving the entire state of Michigan while also seeking to decrease health disparities; harmonizing innovation with evidence-based practice; and strengthening the Health Fund’s potential for impact.

STRATEGIC PLANNING PROCESS & KEY FINDINGS

As the inaugural strategic plan's term neared closure in 2020, the Health Fund Board of Directors issued a competitive Request for Proposals that resulted in the engagement of Bridgeport Consulting to facilitate the planning process which included:

- 1 Individual interviews with each member of the Board and key staff members to identify aspirations and insights that might inform the strategic plan;
- 2 Three facilitated planning retreats with the Board and staff;
- 3 Synthesis of internal and external data including:
 - a. Statewide health funder scan,
 - b. Data portrait of the state of health in Michigan,
 - c. Grantmaking impact assessment, including health disparities efforts,
 - d. Non-grantmaking activities report, and
 - e. Recent survey results from grantee partners.

The planning process produced a number of key findings that informed the strategic approach outlined in this plan. Highlights include:

HEALTH FUND PERFORMANCE

- There is a high level of satisfaction among Board and staff members with the structure and outcomes established in the early years of the Health Fund's existence; and
- There are opportunities to continue to provide significant value by serving as a partner and collaborator for statewide initiatives, filling gaps in key data, and supporting the process of moving ideas from early innovation to scale.

GRANT PARTNER EXPERIENCE

- A 2018 study by the Center for Effective Philanthropy, found that our grant partners have a high level of satisfaction with our communications and our understanding of grantees' fields, contexts, and needs; and
- Grantees also report the need for increased assistance beyond grant dollars including training, connecting with new funders, and collaborating with other agencies.

HEALTH FUNDER INTERESTS

- While there have been additions to the health funder community, the number, size, and interests of Michigan's health funders remain relatively unchanged.

PERSISTENT HEALTH GAPS

- Persistent gaps in health outcomes continue to exist for mothers and infants, foster children, people with behavioral health needs, and older adults;
- Prominent health disparities exist across the state based on race, ethnicity, socioeconomic status, and geographic location; and
- COVID-19 has disproportionately impacted communities of color throughout the state (especially native American, African American, and Latino/a communities).

MISSION, VISION, AND GUIDING PRINCIPLES

MISSION

To improve the health of Michigan residents, with special emphasis on the health and wellness of children and seniors, while reducing the cost of health care.

VISION

Every person in Michigan has the opportunity to pursue a healthy, full life. Individuals can access the care they need, families and communities support healthy living, and systems promote equitable health outcomes.

GUIDING PRINCIPLES

- **Long-term impact.** We emphasize efforts that have the potential to achieve long-term impact with measurable outcomes.
- **Deep collaboration.** We work in partnership with public and private funders, government, health systems, and community organizations and networks, seeking collaborative solutions to complex problems.
- **Bold innovation.** We are open to innovative approaches and take strategic risks with our resources, investing in ways that are both responsive and proactive.
- **Change leadership.** We seek to support and develop effective health leadership at all levels across Michigan. We aim to serve as catalysts for change, constantly learning and sharing what we know.
- **Health equity.** We use well developed data, and voices from affected communities, to help us understand and reduce health disparities. We recognize the value of addressing the systemic conditions and root causes of poor health.
- **Responsible stewardship.** We exercise responsible stewardship through sound financial investments and support for sustainable solutions and new approaches with high potential.

FIVE-YEAR GOALS

In response to these findings, we share the following goals for the next five years.

We believe in a Michigan where everyone has the opportunity to create their healthiest lives. We are committed to the leadership and strategic investments needed to advance health equity across our great state through broad partnerships, better understanding, and a shared commitment to substantive results. We envision success in the next five years to include:

ACCESS TO SERVICES

More Michigan children and seniors have access to high quality physical and behavioral healthcare, nutrition, and services they need to live a healthy life. We see reduced health disparities by race, income, sex, gender identity, sexual orientation, geography, and other characteristics.

HEALTH EQUITY

We have a better understanding of, and more effective approaches to address, health equity gaps and the related social determinants of health. Working at the community level, with thought leaders in this area, we have built deeper understanding of the lived experiences of those with limited access and opportunity to live a healthy life.

INTEGRATED CARE

Michigan is a model of whole person care. Policies and best practices support integrated, person-centered physical and behavioral care. Systems are in place to coordinate care, services, and community resources.

THOUGHT LEADERSHIP

The Health Fund is seen as a thought leader on health issues across Michigan. We contribute valuable expertise to conversations about the drivers of health, including behavioral, clinical, and social determinants of health. We are a trusted nonpartisan resource for decisionmakers.

EFFICACY AND COST EFFECTIVENESS

We are building a strong basis for the efficacy and cost-effectiveness of successful programs. We have a growing body of evidence that our work and our partners' work is leading to health improvements and downstream savings.

HEALTH WORKFORCE AND NONPROFITS

We have a stronger health workforce and health-focused nonprofit community sharing resources and best practices and that is equipped to serve residents across Michigan.

OUR STRATEGIES

The following key strategies represent the priority action areas where the Health Fund has the most potential to drive the largest, highest impact desired changes.

SPARK INNOVATION

We dedicate a portion of our efforts toward driving innovation and discovering new best practices. We look to trusted voices within the communities we serve to help identify new approaches and combinations of efforts that might achieve higher impact. We also accept a degree of risk as the cost of finding new solutions.

EXPAND PROVEN SOLUTIONS

We facilitate the replication and expansion of proven approaches, helping to bring best practices to scale. This includes supporting collaborations, convenings, and other mechanisms to share information and build collective solutions. The Fund is committed to evidence-based practices that stay above partisanship.

SHARE WHAT WORKS

We strive to continually learn from our own work, and the work of our partners, making those findings available to others. We mine and interpret available data with the aim of turning information into actionable knowledge. We also work to bring compelling stories and expert voices into conversations about advancing health.

STRENGTHEN THE HEALTH NETWORK

We work to build capacity, encourage collaboration, and enable cost-savings within key partner organizations. This includes technical assistance with program design, evaluation, and impact as well as connecting smaller, less resourced organizations with institutions that provide greater reach and resources.

INFORM POLICY AND GOVERNMENT SERVICES

We leverage sustainable resources through public sector partnerships to increase efficiency, effectiveness, and reach of public policy and health-related government processes. Our approach includes education, dissemination, and technological advancement to enable statewide scaling and institutionalization of proven solutions that are directly linked to health outcomes. The Health Fund does not advocate for the adoption or rejection of specific legislation.

PROGRAM PRIORITIES

We recognize that the health of children and seniors depends upon the health of the families, communities, and social systems that surround them. Our work is focused on improving health at multiple levels of scale, from individuals to communities to statewide systems.

CURRENT PROGRAMS

Nutrition & Healthy Lifestyles

Improving food systems, eliminating barriers to healthy eating, and promoting opportunities for access to physical activity and wellness interventions, with an emphasis on children.

Behavioral Health

Improving access to high-quality mental health and substance use disorder health care with a focus on expanding integration of care and the behavioral health workforce.

Healthy Aging

Improving the quality and coordination of care and supporting caregivers to improve the health and well-being of older adults.

Community Health Impact

Supporting community-driven solutions, nonprofit collaboration, and capacity building.

Special Projects & Emerging Ideas

Enabling statewide, transformational, and systemic change through invitation-only partnerships.

AREAS OF INCREASED EMPHASIS

- Building on existing efforts, we will expand our work on *maternal and infant health* to reduce disparities and improve outcomes for infants and their mothers, including morbidity, mortality, and behavioral health.
- Across the program areas named above, the Health Fund is committed to increasing understanding, training, and response to the unique challenges faced by *foster and adopted children*, including those in guardian and kinship care, and their caregivers.

Finally, we know that many of these areas are overlapping and interdependent. Therefore, the Fund is also committed to *collaborating across program areas* in order to decrease health disparities, increase access, and fill gaps in knowledge.

GRANTMAKING AND NON-GRANTMAKING PORTFOLIO

The Health Fund works to advance our mission through a combination of grantmaking and non-grantmaking activities. While the majority of our funds are dispersed in direct grantmaking activities, we also provide non-grantmaking services to maximize the success of our grantees, to build broader knowledge of critical health issues, to support the development of health policy and leadership and to encourage collaboration and the sharing of best practices.

In addition to program-specific requirements, grantmaking and non-grantmaking activity decisions are made based on the following factors:

- Aligns with our vision and mission, guiding principles, and statutory requirements
- Is likely to lead to meaningful impact
- Fills a gap in existing health leadership or addresses a significant unmet need
- Has a reasonable expectation of becoming sustainable, or building helpful knowledge
- Is an area where the Health Fund has, or can commit to acquiring, substantial expertise and capacity to properly address the issue

GRANTMAKING

The Health Fund currently awards approximately \$35 million dollars annually across the state of Michigan. Grant recipients range from individual community organizations to state-wide entities, from institutes to universities, from small health centers to entire health systems. We focus our grantmaking on areas of health disparities as well as scaling up solutions that will impact health across the state of Michigan.

On one end of the spectrum, we recognize the value of new solutions and are willing to take measured risks to support these discoveries. At the same time, we are committed to strategic investments in growing proven practices with particular emphasis on institutionalizing systems changes with the highest potential for broad, long-term impacts.

Our grantmaking approach reflects this spectrum by including: consideration of new ideas from potential partners, a structured RFP process for a range of specific grant programs, and a select set of highly proactive collaborations between the Health Fund and invited partners.

Our grantmaking activities primarily focus on:

- **Community partnerships.** The Health Fund supports community-based organizations with bold ideas to address health challenges in our priority areas. We listen carefully to the voices of those with lived experience and work to empower community driven solutions.

- **Innovation, model development, and replication.** With support from the Health Fund, grantees advance the discovery and scaling of innovative and evidence-based strategies to improve physical and behavioral health. Projects range from developing new care delivery models and strategies for increased access to expanding successful models and proven interventions.
- **Systems change.** We work with select organizations to institutionalize large-scale, complex projects with the potential to have significant statewide impact. These projects grow from community partnerships and model development as well as our ongoing relationships with state agencies, providers, and other stakeholders.

NON-GRANTMAKING

In addition to grant funding, the Health Fund works to strengthen partner networks, support grantees, and ensure the transfer of knowledge, skills, and best practices through the following non-grantmaking activities:

- **Develop proactive strategies to inform statewide health policy and practice.** Taking a broad systems-level, public health perspective, the Health Fund works with a wide range of partners to increase efficiency, effectiveness, and reach of public policy and health-related government processes.
- **Convene strategic collaborations centered on populations with the greatest needs.** Our state's most pressing health challenges require bringing many voices to the table. We foster dialogues, partnerships, and collaborations with other funders, community members, and subject matter experts around critical health issues.
- **Build capacity within key community and government agencies.** We seek to further strengthen our state's health-supporting ecosystem by building the capacity of partner agencies through workforce development, technological advancement, skill-building, and the sharing of resources.
- **Serve as thought partners and advisors.** While the Health Fund is often in the role of convenor, we also serve as advisors and partners at the request of select collaborators whose missions align with our work.
- **Translate data and discoveries into actionable knowledge.** Through development of reports, research findings, and compelling stories, we share best practices, bodies of knowledge, and lived experiences that bring to life the collaborative work of communities, organizations, and other health funders.

LIMITATIONS

While rare exceptions may occur, the Health Fund generally does not fund, or engage in:

- Short-term funding for health-related emergencies
- Clinical research
- Capital projects
- Ongoing program operations and staff support
- Lobbying
- Litigation
- Loans

Consistent with the Fund's enabling legislation, the Health Fund may not provide grants that extend beyond three years.

EVALUATION & COMMUNICATIONS

The Health Fund is committed to monitoring, understanding, and sharing the impact of our work through thoughtful, collaborative approaches to evaluation, as well as effective and timely communication of our efforts and findings to all stakeholders. We are also a “learning organization,” committed to continuously seeking out the best thinking across the state, the nation, and the international community. To achieve this, the Fund will:

- Work in partnership with public and private funders, government, health systems, and community organizations and networks
- Seek out voices from affected communities and include community-identified measures of change
- Continuously evaluate Health Fund performance at both the program-specific and foundation-wide levels
- Pursue new perspectives and educate ourselves on the findings and experiences of our counterparts across the state, the nation, and beyond
- Integrate evaluation and communications efforts into the overall work of the organization

The Health Fund will leverage our evaluation and communications strengths to:

- Generate knowledge that will advance our mission of improving the health of Michiganders
- Tell purposeful stories that inform and inspire others who share our mission
- Be accountable to assess our effectiveness and measure our overall impact
- Inform policymaking and support health delivery transformation in the state of Michigan and beyond

Definitions

- **Health disparities** are differences that exist among specific population groups in the attainment of full health potential....¹ While the term disparities is often used or interpreted to reflect differences between racial or ethnic groups, disparities can exist across many other dimensions as well, such as gender, sexual orientation, age, disability status, socioeconomic status, and geographic location.²
- **Health equity** means striving for the highest possible standard of health for all people and giving special attention to the needs of those at greatest risk [socially, economically, demographically, or geographically] of poor health.³
- **Social determinants of health (SDOH)** are the conditions in the environment where people are born, live, work, play, worship, and age that affect a wide range of health, functioning, and quality-of-life outcomes and risks.⁴

¹ National Institutes of Health, 2014. www.nhlbi.nih.gov/health/educational/healthdisp/

² National Academies of Sciences, Engineering, and Medicine; Health and Medicine Division, 2017. www.ncbi.nlm.nih.gov/books/NBK425844/

³ World Health Organization 2021. https://www.who.int/health-topics/social-determinants-of-health#tab=tab_3

⁴ Healthy People 2030. US Department of Health and Human Services. <https://health.gov/healthypeople>