



A New Strategic Direction for Alliance Healthcare Foundation

Introduction

The Alliance Healthcare Foundation (Alliance) has been a vital source of funding, ideas and influence on the health challenges facing the greater San Diego area for nearly two decades. Over this time, Alliance has dedicated over \$44 million and leveraged an additional \$41 million towards the most pressing health issues in the region, pursuing its mission ***to “promote health and wellness, with a special emphasis on the underserved.”*** Alliance is the only local, nonprofit, and independent healthcare foundation in the San Diego region, providing a needed public voice for the health and healthcare needs of the community.

As Alliance approached its 20th anniversary, the board and staff embarked on an intensive strategic planning process to reflect on the foundation’s mission and identify the most powerful opportunities for impact in the years ahead. We were driven to ensure that our resources – grantmaking dollars, leadership position, ability to bring together diverse community voices, and ability to broker partnerships with other institutions – could make a substantial difference, “move the needle” for the people of San Diego and Imperial Counties. We want to ensure that the impact we have is unmistakable.

The strategic planning process involved explicit choices about what to do, as well as what not to do. While some of these choices were difficult, our focus and clarity will enable us to pursue our goals in a steadfast manner and with the full weight of our philanthropic resources. A clear strategic direction also makes it possible for us to better define success and track our social impact.

Alliance’s Strategic Planning Process

Alliance’s strategic planning process was designed to promote intensive board, staff, and community reflection on the Foundation’s key strengths and challenges, unique contributions, and opportunities for impact. Drawing on nearly 70 interviews with stakeholders, extensive research about health needs, and a series of thoughtful and provocative board and staff discussions, we carefully examined our current path and articulated a future strategic direction (“Maximizing Impact Through Strategic Planning”).

Reaffirming Our Values and Guiding Principles

Our process began by building understanding and agreement within Alliance about the foundation's distinctive resources, expertise, values, and culture. Board and staff articulated a set of guiding principles voicing our commitment to:

- support vulnerable populations and the medically underserved,
- leverage the resources of both traditional and non-traditional funding partners,
- fill gaps in the system that others have not addressed,
- lead through innovative grantmaking and advocacy,
- support projects with potential to make a significant difference in the health of the people in our community.

These principles have been embedded in our work over the past two decades and through this strategic planning process, we have reaffirmed them in our work going forward.

Gathering Community Perspectives and Data

After reaffirming our core values, we sought out as much information as possible to better understand community needs and identify high-impact opportunities to address them. With the help of FSG Social Impact Advisors, a nonprofit strategy consulting firm, we spoke with more than 50 grantees, other funders, practitioners, and experts in the field. These conversations improved our understanding of our role in the community, our impact to date, our strengths and areas for improvement, and our most promising future opportunities to tackle health and healthcare needs. We are grateful to the many community members who contributed their time and insights throughout this process.

In addition to community conversations, we also consulted the research and data about health needs in San Diego County, which further supported a high prioritization of access to health and healthcare. We analyzed multiple sources, including the 2004 and 2007 *Community Health Improvement Partners (CHIP) Needs Assessments*, the Abaris Group's *San Diego HealthCare Safety Net Study*, the *United Way Community Impact Report*, and the *California Health Interview Survey (CHIS)*. The "Access to Healthcare in San Diego: a data snapshot" document contains a synthesis of the research findings which influenced our chosen strategic direction.

The community conversations and research refined our understanding of the potential opportunities for Alliance to complement, support, and leverage the work of key partners and to fill important gaps not being addressed.

Setting Priorities and Articulating Our Vision and Strategic Direction

Through several rounds of deliberations, and building on research and input from the community, Alliance board and staff discussed the many pressing health needs within the San Diego region and began to set priorities for the coming years. These discussions were inspiring but sobering - with a broad range of compelling opportunities but a limited pool of resources, we were forced to make choices and to narrow in on issues we felt offered the highest potential to make a difference. Some of the factors that influenced our choices included:

- the likelihood we could achieve success with limited grantmaking dollars,
- the potential to partner with other committed community organizations,
- the opportunity to advocate, convene, and to lead,
- the ability to determine how progress and outcomes could be measured.

Our Vision

To state it simply: without health, quality of life suffers. We believe the healthcare system either supports or restricts health, and too often it fails our most vulnerable. We envision a San Diego where everyone, especially the most vulnerable, can access quality, appropriate, timely, and effective care.

Alliance's Strategic Direction

Alliance is in a unique position to help address the region's healthcare challenges. We are free from many of the political, resource, and time constraints that our partners in the healthcare sector face. This freedom creates an opportunity and an obligation. We must act boldly because it is possible we can do what others cannot. And we will seek partners at every opportunity. We are committed to making a difference in San Diego around health care because the needs are so great.

Focus on the Most Vulnerable

Our commitment remains focused on serving the most vulnerable and medically underserved populations in the San Diego area:

- People and families under 250% of the Federal Poverty Level (FPL), including the working poor
- Children
- Homeless individuals and families

Focus on Access to Health/healthcare

Our efforts will be directed to enhancing access to health/healthcare as the key issue that needs to be addressed so the health, and therefore the lives, of San Diegans - especially the poor and the most vulnerable - can be improved.

The data on access issues facing San Diegans eloquently illustrates a compelling need. At the same time, a majority of community leaders, stakeholders, and grantees we spoke with urged us to continue our work on access to health and healthcare, and to focus on a limited number of clear, specific goals to maximize our impact in the San Diego region. The broad issue of access to health/healthcare emerged as a top priority because of the sheer number of people affected, the link between access to healthcare and many other critical health issues, and the systemic consequences of inattention. Many people we spoke with also highlighted the need for a leader to promote coordination within the fragmented safety net system that many of San Diego's low-income and underserved populations rely on for care:

- *"The **inability to access care** is a **huge issue** for San Diego County, and my top priority."*
- *"**Access to care gets at the underlying issues in health.**"*
- *"Alliance **has worked hard on access** to care and has served as a significant convener. **I hope Alliance continues** to do that."*
- *"A local funder like **Alliance is well positioned** to meet the needs of uninsured residents and **strengthen the safety net**. They can understand the communities and opportunities because they are on the ground."*

- *“Much **work needs to happen in strengthening the safety net** in a broader context. A lot of uninsured patients go between hospitals, community clinics, and nonprofits – there is **no system to help them coordinate.**”*

Focus on Innovative and Collaborative Approaches

Alliance will pursue access to health/healthcare by using our unique capabilities and expertise. Our stakeholders recognize our commitment to innovation as a unique strength:

- *“Alliance can provide funding for **innovative programs** that can make a difference. Because Alliance has flexibility and thinks creatively, they **could fund pilot projects** that are **worth testing to see if they are successful.**”*

Therefore, included with our other approaches over the next five years, Alliance will work to enhance access to health/healthcare, **with a focus on increasing the capacity and coordination of the healthcare delivery system through advocacy, information technology, workflow improvements and innovation in order to improve health outcomes.**

We are looking for innovative solutions - using technology, identifying and adopting best practice care models in and outside of San Diego, leveraging business practices and using the media – to bring about changes in how care is delivered to serve the most vulnerable.

We will also be seeking opportunities to support and enhance cross-organizational collaboration, ideas that incentivize change in organizational behavior, and ways of promoting systems thinking.

Acting as a Funder, Partner and Advocate

In pursuing our vision and strategic direction, we are willing to commit large amounts of our resources to the right opportunity. However, we also recognize, in the end, our resources are limited and the needs are great. Therefore, we intend to use our unique position to bring issues around health care access to public attention, creating public will to make change happen. We will respond to the calls from our stakeholders:

- *“I hope the foundation keeps its focus on **championing and advocating** on behalf of **the underserved** and on **issues that don’t get much voice.**”*
- *“I see a need for a **well-respected organization that can convene, play the honest broker role, and work from a base of solid research.** Alliance seems **well positioned to do that.**”*
- *“I’d like to see Alliance **championing tough issues** but at the same time having the **relationship-building and coalition-building skills to move something in a political environment like San Diego** – that’s the kind of sweet spot for strategic investment from a foundation.”*

We will work to create partnerships that leverage our resources and those of others – our government, businesses, funders, nonprofits and individuals - who are similarly enthusiastic and see the opportunity to make a difference in San Diego.

Looking to the Future

Over the course of the next several months, Alliance will continue to identify specific opportunities for investments aligned with our strategic direction through conversations with community leaders, grantees, key stakeholders, and additional research as needed. Our timeframe is long, and though we will measure our success over years, our results must still be clear. We will therefore be developing specific five-year goals, evaluation measures, and action plans around our vision and strategic direction.

In pursuing our strategic direction, we are prepared to adapt to changes that inevitably will appear in our landscape, but we remain unwavering in our commitment to change healthcare for the better in the San Diego region. Our ultimate measure of success will be improvements in health outcomes for the most vulnerable individuals and families, as well as a more robust healthcare safety net and strong public health infrastructure that will benefit every San Diegan.