



Heluna Health®

**STRATEGIC
FRAMEWORK
2022-2025**

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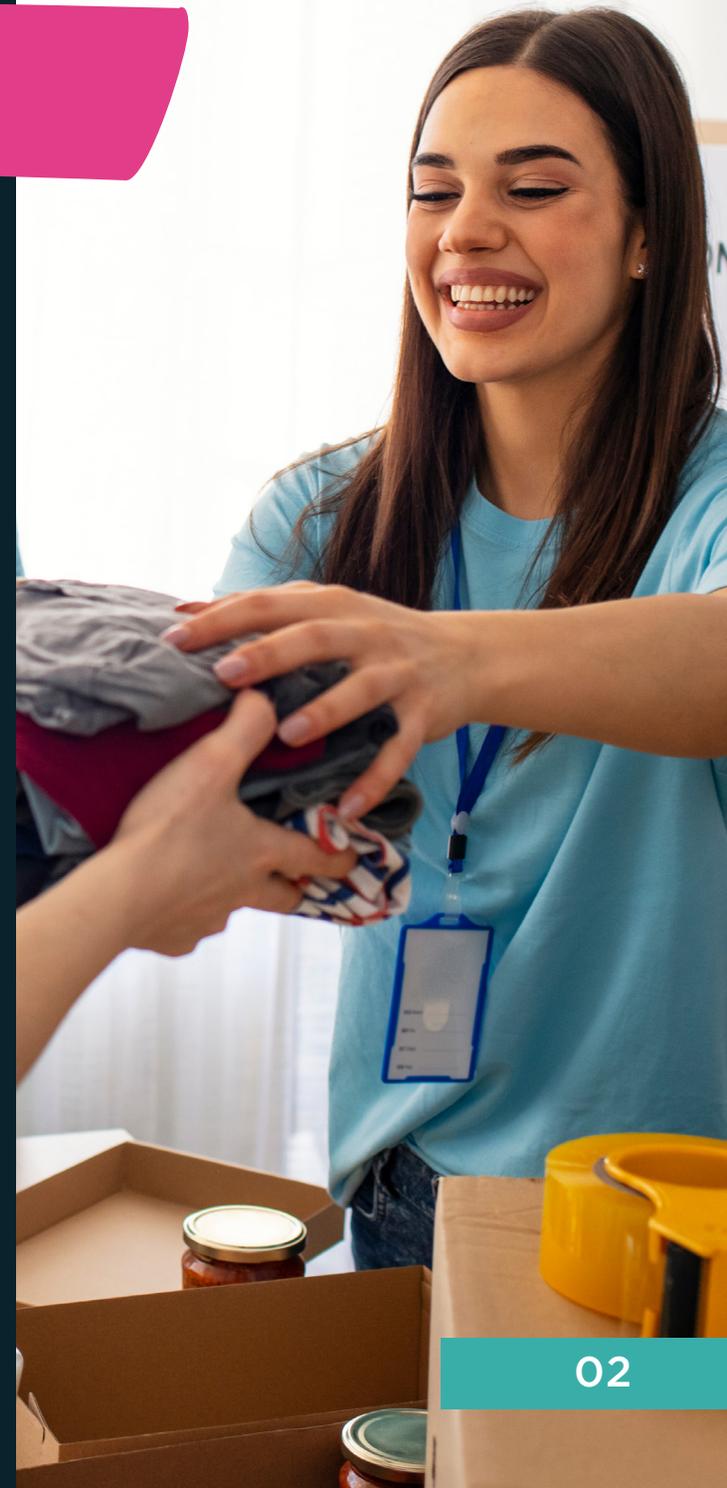


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Message from Our President and CEO

Dear Heluna Health Community,

For over 50 years, our strong and growing Heluna Health network has partnered to advance population health and achieve meaningful improvements in people's lives. Thank you for joining us on this journey to build healthy, strong communities for all.

As we look to the future, Heluna Health has developed a highly ambitious strategic plan that will serve as our compass through fiscal year (FY) 2025 to guide us as we work to enhance the health, wellness, and resilience of every community we serve. This effort has been made possible through the dedicated leadership of our Board of Directors and collaborative team. It is powered by our committed and inspiring workforce who are at the core of all that Heluna Health does and who will be pivotal to the plan's successful implementation. It is informed by our clients, funders, program participants, and many other stakeholders, who are vested in our shared long-term success.

This strategic plan framework will give you a glimpse at the key components of our four-year strategic plan. We believe that the core components of the plan developed with significant input from a variety of key stakeholders, including staff, clients, our Board of Directors, population health leaders, and outside consultants best positions Heluna Health to drive positive outcomes in the field by prioritizing the impactful work that our organization is uniquely suited to undertake. This framework focuses on five strategic imperatives, or "pillars", which include:

- Population Health Impact
- Financial Sustainability & Growth
- Awareness & Reputation
- Operational Efficiency & Excellence
- An Engaged & Thriving Culture

Woven throughout each of these five pillars are five of our deepest commitments and goals to 1) improve **health equity**; 2) strengthen Heluna Health's **reputation** as a go-to source for population health leadership and innovation; 3) enhance **operational excellence**; 4) maintain an **engaged and thriving culture**; and 5) empower our employees to pursue **meaningful work** in connection with our mission and vision—work that is deeply aligned with our core values, including diversity, equity, and inclusion. These commitments build on the agency's legacy over the course of its more than 50-year history.

To keep us accountable to our community on this journey, each pillar centers on one clear goal statement with defined key performance indicators (KPIs); each KPI includes both an associated threshold and stretch target. Additionally, each pillar is built upon a set of core strategies, which include associated tactics and metrics.

This plan is informed by robust analyses and acknowledges the evolving landscape in both clinical healthcare and population health, particularly in the wake of the COVID-19 global pandemic, which began to dramatically impact all of us in the early months of 2020. In developing this plan, we carefully considered the most important ways that the COVID-19 pandemic has changed the population health landscape in the United States, particularly with respect to the most likely future trajectory of population health programming priorities, as well as the shifting landscape of stakeholders and potential funders. As such, we have challenged current assumptions through multiple types of data analyses, stakeholder surveys, after-action workshops, and qualitative interviews.

With our long track record of supporting partners in outbreak preparedness and response, Heluna Health is well positioned to assist communities in becoming more proactive on their readiness journey, so that they never find themselves caught off guard by a novel virus again. Finally, but most importantly, as the pandemic revealed and worsened health disparities, Heluna Health will seek to scale solutions that eliminate or significantly reduce such gaps in our care for each other.

We are honored and emboldened to embark on our journey to bring this plan to fruition, and look forward to working in partnership with you to effect real change that will impact the lives of millions.

In health,



OUR MISSION

Heluna Health enhances the health, wellness,
& resilience of every community we serve.



OUR VISION

Healthy, strong communities for all.

OUR VALUES



COLLABORATION

We strive to ensure that the shared mission embodied in our population health partnerships are a blueprint for 21st century health and wellness.



INNOVATION

Our flexible models serve to empower the needs of our partners through relevant, client-centered solutions in pursuit of the greater good.



DIVERSITY, EQUITY & INCLUSION

We embrace the power that a diverse, equitable, and inclusive workforce and client-base bring to the advancement of our agency and partner goals.



INTEGRITY

We seek to model the highest standards of ethics and transparency in all that we do.



HEALTH PROMOTION

We strive to model, promote, and advance healthy behaviors in all that we do.



PROFESSIONALISM

We seek to provide reliable and consistent service to all of our partners through clear and valuable professional guidance.

5 Pillars of Our Strategic Plan

POPULATION HEALTH IMPACT

By FY 25, Heluna Health will positively impact the communities we serve by measurably advancing health equity and by equipping partners nationally with innovative strategies and capacity building services to protect and enhance population health.

FINANCIAL SUSTAINABILITY AND GROWTH

By FY 25, Heluna Health will achieve long term financial sustainability by diversifying revenue and growing net assets.

AWARENESS AND REPUTATION

By FY 25, Heluna Health will measurably build awareness and reputation within the wider population health and social service communities.

OPERATIONAL EFFICIENCY AND EXCELLENCE

By FY 25, Heluna Health will deploy innovative, automated data tools (including, where possible, AI-driven predictive analytics) to offer clients greater value with respect to their administrative, fiscal, and program data.

AN ENGAGED AND THRIVING CULTURE

By FY 25, Heluna Health will measurably enhance employee engagement by continually empowering our teams to pursue meaningful work in connection with our mission and vision — work that is deeply aligned with our core values, including diversity, equity, and inclusion.



Quick Facts

Active Projects (FY20): **> 450**
(contracts, grants & other initiatives)

Win rate on new proposals: **85%**
(YTD as of Q3FY21)

Win rate on grant/contract renewals: **100%**
(YTD as of Q3FY21)

Number of women & children served through
our nationally recognized PHFE WIC program:

> 180,000 per month
(YTD as of Q3FY21)

Founded in **1969**

Serving Clients for
> 50 years

of Employees:
2,543
(as of 3/31/21)

FY20 Revenue:
\$137M
(as of 06/30/20)





Partnerships with Select Universities*

- Claremont Graduate University
- Columbia University Mailman School of Public Health
- University of California, Berkeley
- University of California, Davis
- University of California, Los Angeles
- University of California, San Diego
- University of California, San Francisco
- University of Illinois at Chicago
- University of Colorado System
- Emory University
- University of Kentucky
- New York University
- University of Miami
- University of North Carolina System
- Oregon Health and Science University
- Stanford University
- Rutgers University
- Tufts University
- Tulane University

*Heluna Health typically has long-standing project partnerships with colleges and universities. These entities often serve as a direct funder to Heluna Health or as a key sub-recipient.



Select Clients & Funders in Our Network

Association of Public Health Laboratories

City of Los Angeles

City and County of San Francisco

First 5 LA

Flu Lab

Health Resources & Services Administration

Institute for Healthcare Improvement

Kaiser Permanente

Los Angeles County

National Institutes of Health

RTI International

California Department of Public Health

The University of California System

Unihealth Foundation

U.S. Centers for Disease Control & Prevention

U.S. Department of Agriculture

U.S. Department of Education

U.S. Department of Health and Human Services



STRATEGIC PILLAR 1

Population Health Impact: Advance Health Equity & Enhance Community Preparedness

TOPLINE KPIS

ADVANCE HEALTH EQUITY

- Percent Black and African Americans in Southern CA who are both eligible for and participating in WIC
- Reduction in the prevalence of childhood obesity among low-income children in Southern CA
- Successful scale of at least one evidence-based model that reduces health disparities beyond CA

ENHANCE COMMUNITY PREPAREDNESS

- Development of preparedness evaluation tools for counties in the U.S.
- Creation of enhanced training services for the population health workforce

STRATEGIES

ADVANCE HEALTH EQUITY

- Leverage WIC staff and experience to more broadly impact food insecurity and childhood obesity
- Advance policies and practices that eliminate structural racism in prenatal, perinatal, and postnatal care
- Pilot and scale innovative models beyond CA that reduce health disparities in areas of core expertise
- Research, measure, and share social impact of our programs

ENHANCE COMMUNITY PREPAREDNESS

- Develop and scale preparedness evaluation tools for counties in the U.S.
- Create enhanced training services for the population health workforce

STRATEGIC PILLAR 2

Financial Sustainability & Growth:
Diversify Revenue & Grow Total Net Assets

TOPLINE KPIS

- Growth in total net assets
- Percent of non-COVID-19 revenue by funding source (federal and non-federal)

STRATEGIES

- Identify and partner with new funders
- Grow new, mission-aligned revenue opportunities and philanthropic support
- Evaluate and consider real estate acquisition
- Diversify revenue and clients geographically to enhance our national footprint

STRATEGIC PILLAR 3

Awareness & Reputation: Measurably Build Awareness & Reputation Within The Population Health & Social Service Communities

TOPLINE KPIS

- Percent increase in brand awareness (defined as people working in the field of population health who are familiar with Heluna Health)
- Ranking on a national reputation listing of best nonprofits
- Net promoter score (a measure of clients who report that they would refer their colleagues to Heluna Health)

STRATEGIES

- Refine a common branding umbrella for all Heluna Health program partners
- Offer service menus that include and reflect our strategic areas of focus
- Use social media to further grow an interactive community of interested stakeholders
- (Stretch): Create a branded set of content focused on new research findings and population health impact

STRATEGIC PILLAR 4

Operational Efficiency & Excellence:

Deploy Innovative Analytic Dashboards, Tools, and Offer Clients Enhanced Value With Respect To Their Administration & Program Data

TOPLINE KPIS

- Percent of client survey respondents who rank Heluna Health as 'very good' or 'outstanding' on operations-related measures
- Number and type of new, automated data tools created for clients that are identified as value-enhancing on client surveys

STRATEGIES

- Develop a new data analytics team
- Develop a balanced scorecard of metrics based on national benchmarks to drive C/Q/I
- Enhance automated dashboards, tools and reports to optimize data value for clients
- (Stretch): Understand and use AI/ data-mining tools to develop and share meaningful, predictive analytics with clients

STRATEGIC PILLAR 5

**An Engaged and Thriving Culture:
Enhance Employee Engagement by
Continually Empowering Our Teams to
Pursue Meaningful Work in Connection
with our Mission and Vision**

TOPLINE KPIS

- Percent of Heluna Health employees who agree or strongly agree that what they do is 'valuable' or 'important'
- Implementation of 'Workplace Inclusion Initiative' recommendations

STRATEGIES

- Use key opportunities to connect employees to the mission and vision of the organization
- Implement 'Workplace Inclusion Initiative' recommendations
- Foster volunteerism
- (Stretch): Assess long-term remote work options (post-pandemic) and incorporate key elements that enhance engagement without sacrificing productivity and client service



Heluna Health[®]

Join Us

Visit www.HelunaHealth.org to learn how you can partner with us, support our work, join our team, and more.

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