



# Strategic Framework 2025 - 2028

Prepared By:



## Background

Superior Health Foundation (SHF) was established following Duke LifePoint's acquisition of Marquette General Hospital, with the primary goal of addressing unmet healthcare needs, advancing health education, and supporting programs and research focused on illness prevention and health promotion in Michigan's Upper Peninsula. In early 2024, SHF appointed a new CEO, Megan Murphy, prompting the organization to re-examine its mission, vision, values, and strategic direction for the coming three years.

This strategic planning process was a response to evolving community needs and the leadership transition. It aimed to ensure that SHF's approach remains current and effective in meeting the health and well-being challenges of the region. To guide this process, SHF engaged Delaney Data Empowerment (DDE), a team experienced in mixed methods evaluation and strategic planning, and local consultant Heather Picotte, whose regional knowledge supported a grounded and practical approach. This collaboration was designed to provide a clear, data-informed framework that aligns with SHF's operational goals and community expectations.

## Summary of Methodology

Prior to developing the strategic plan, DDE interviewed SHF staff to gain a comprehensive understanding of the organization's history and internal priorities. The insights from these discussions, highlighting the staff's vision, key challenges, and areas for improvement, were consolidated and shared with both staff and Board members, providing a critical foundation for the strategic planning process. Following the staff interviews, DDE staff interviewed all Board members.

**Based on the interviews, strategic planning session, and best philanthropy and nonprofit practices, DDE identified several key focus areas for SHF, including:**

- **Enhanced Communication:** Improving the understanding and articulation of SHF's mission and strategic outcomes among staff, Board, and community partners.
- **Stronger Board-Staff Connections:** Increasing the Board's knowledge of and direct access to SHF staff.
- **Expanded Community Reach:** Enhancing SHF's presence and impact across the Upper Peninsula.
- **Clarified Governance:** Ensuring a clearer understanding of Board roles and effective organizational decision-making.

Outcome buckets, or measures of the above focus areas of work over the next 3-5 years, were recommended by DDE to the Board and staff. While activities may be adjusted as needed, these outcome buckets provide a consistent framework for both staff and the Board, enabling regular tracking of progress and alignment with the overall strategic framework.

DDE facilitated a session to gather further input on SHF's mission, vision, values, and outcome bucket areas. The information from that session was summarized and used to refine the recommendations. Then, DDE interviewed ten community organizations and individual stakeholders from across the Upper Peninsula for feedback on the proposed plan.

The following documents SHF's mission, vision, values, outcome buckets, and associated activities. The final section outlines how SHF will be responsible for ensuring the implementation of this plan. It is imperative to continue to refer to this document to move forward with this strategic direction.

## **Mission & Vision**

### **Mission:**

**Our mission is to proactively support organizations and initiatives across the Upper Peninsula to improve health and well-being.**

### **Vision:**

**We envision an Upper Peninsula where everyone has the opportunity, support, and resources to achieve their optimal health and well-being.**

## Values

Value	Description
<b>Transparency</b>	We are committed to transparency with our partners and community as responsible stewards of resources benefiting the health and well-being of Upper Peninsula communities.
<b>Health Equity</b>	We recognize that people face unequal circumstances and power imbalances impacting health and well-being. It is essential for everyone to work together to remove these barriers. We are committed to fostering inclusive environments and dismantling obstacles for our partners and communities across the Upper Peninsula.
<b>Impact</b>	We value proactivity, adaptability, and creativity in achieving positive health outcomes throughout the Upper Peninsula.
<b>Collaboration</b>	Partnerships and collaboration are essential to driving positive health outcomes. Therefore, we proactively collaborate with organizational partners across the Upper Peninsula and beyond to leverage resources and co-create solutions.
<b>Integrity</b>	Trust and respect create an environment where individuals feel valued and understood. By acting with integrity, we seek to create an environment where others can rely on us to act with honesty and fairness in the best interest of Upper Peninsula communities.

## Outcome Buckets

**Outcome Bucket 1: Develop and strengthen partnerships with organizations that serve the Upper Peninsula, including tribal partners, nonprofits, and other funders.**

**Activity 1:** Arm Board and staff with tools to communicate the Foundation's goals.

**Activity 2:** Identify key partners to build relationships and connect with those partners.

**Activity 3:** Ensure diverse Board member representation.

**Outcome Bucket 2: Have a clear grantmaking strategy with clearly defined criteria (yet still broad enough so as not to exclude) and have systems and structures to report out how the overall strategy is impacting community health in the Upper Peninsula.**

**Activity 1:** Develop grantmaking strategy and refine as needed.

**Activity 2:** Develop and implement evaluation strategy.

**Activity 3:** Develop grant decision-making strategy and communicate publicly.

**Outcome Bucket 3: Continue to bring clarity to all levels of organizational structure, including components of participation and organizational decision-making for Board, Committees, CEO, and staff.**

**Activity 1:** Ensure Board and Committee members have a clear understanding of their roles and expectations.

**Activity 2:** Ensure CEO and staff members have a clear understanding of their roles and expectations.

## Tracking Progress, Learning, & Adapting

The Learning Plan is a critical element of SHF's strategic framework, establishing an intentional approach to monitor progress, document outputs, and measure outcomes over the three years. By incorporating regular data collection, analysis, and reporting cycles, the plan promotes and encourages that strategic decisions are based on real-time insights, allowing the organization to remain agile in response to changing community needs and operational challenges. This approach promotes transparency and accountability and reinforces SHF's commitment to learning and adapting in pursuit of enhanced health and well-being across the Upper Peninsula.

## Measures & Reporting

Two types of metrics will be used to measure progress on this strategic plan: Outputs and outcomes. Outputs are a measure of the activities. In other words, it answers the question, "Did you do what you said you would do?" Outcomes measure changes in beliefs, behaviors, attitudes, or conditions. They answer the question, "So, what happened because you did all the activities?" These metrics can be both quantitative (e.g., numbers) or qualitative (e.g., stories or themes). The following summarizes how the outputs and outcomes will be measured and reported.

Both measures are designed to capture the immediate and tangible products of the strategic planning process. These measures provide a snapshot of the activities underway, such as completing stakeholder interviews, feasibility studies, and developing updated policies or guidelines. Regular reporting on these outputs will enable the Board and leadership to monitor progress in real-time, confirming that each phase of the process is on track. By documenting key activities and deliverables, the reporting mechanism establishes a continuous feedback loop supporting informed decision-making and timely adjustments, reinforcing the overall strategic intent.

# Outcome Measures & Reporting

Outcome	Measure (Frequency)	Key Deliverable & Use (Frequency of Use)
<b>Outcome Bucket 1</b> Enhanced Community and Partnership Engagement <i>(Strengthen partnerships with Upper Peninsula organizations, tribal partners, and other funders)</i>	<b>Quarterly:</b> Count of participation in stakeholder meetings (e.g., community meetings)  <b>Ongoing:</b> Collect stakeholder feedback via surveys	Partnership Engagement Report: Details new partnership agreements and stakeholder meeting outcomes <i>Compiled and reviewed quarterly; used to adjust outreach strategies and inform Board discussions on community impact</i>  Stakeholder Survey: Collects feedback from stakeholders <i>Conducted annually</i>
<b>Outcome Bucket 1</b> Diverse Board Member Representation <i>(Develop and implement a recruitment strategy to build a diverse Board and Committee)</i>	<b>Monthly:</b> Track the number and diversity of Board candidate contacts (e.g., by expertise, community affiliation, and demographics)  <b>Annually:</b> Review Board composition against diversity targets and assess recruitment activities	Quarterly Board Diversity Report: Outlines recruitment metrics and Board composition <i>Reviewed quarterly at Board meetings</i>  Annual Diversity Strategy Update: Presents a revised recruitment strategy incorporating feedback and setting targets for the upcoming year <i>Used annually to guide recruitment efforts</i>

## Outcome Measures & Reporting

Outcome	Measure (Frequency)	Key Deliverable & Use (Frequency of Use)
<b>Outcome Bucket 2</b> Effective Grantmaking Strategy and Evaluation System <i>(Develop a clear grantmaking framework and evaluation process)</i>	<b>Quarterly:</b> Monitor grant application volume, approval rates, and post-grant evaluation metrics (e.g., success stories, community impact data)	Updated Grantmaking Strategy and Evaluation Framework: Serves as the basis for grant decisions and impact assessments <i>Reviewed quarterly and updated annually</i>
<b>Outcome Bucket 3</b> Strengthened Organizational Governance and Clarity <i>(Clarify roles and decision-making processes for Board, Committees, CEO, and staff)</i>	<b>Annually:</b> Review Board/Committee handbook revisions and onboarding feedback  <b>Annually:</b> Assess governance performance through evaluations	Revised Governance Documents and Onboarding Materials: Provides updated governance policies and orientation materials <i>Reviewed annually during Board sessions and used for new member orientations</i>

This Strategic Framework Overview and accompanying Learning Plan provide a clear, data-informed roadmap for SHF's three-year strategic planning process. By aligning activities with measurable outcomes and embedding continuous learning and evaluation, SHF is well-positioned to drive impactful change and enhance health and well-being across the Upper Peninsula.