

**Community Catalyst
Strategic Goal and Objective
For Board Review and Approval**

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| <i>Strategic Goal 3: Define Community Catalyst as the next generation advocacy leader by influencing health system policies and practices to be sensitive and responsive to consumer interests and needs.</i> |
| 1. Identify emerging issues that are ripe for action and investing in effective and innovative strategies to address them. |
| 2. Foster development, adoption and dissemination of institutional and public policies that represent best practices in areas of concern to consumers |
| 3. Participate in research that evaluates health policies, practices and outcomes of interest to consumers. |
| 4. Complement public policy campaigns with strategies to advance health system quality improvement |
| 5. Utilize our DC presence to promote our issues at the federal level. |

Old Goals #3 & # 4

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| <i>Strategic Goal 3: Influence health system policies and practices to be sensitive and responsive to consumer interests and needs.</i> |
| 1. Incubate and support new delivery models that incorporate patient engagement and coordinated care. |
| 2. Foster development and adoption of institutional policies that represent best practices in areas of concern to consumers, e.g., conflict of interest and evidence based practice to reduce the impact of pharmaceutical, device and biotech industry marketing on patient care. |
| 3. Participate in research that evaluates health policies, practices and outcomes of interest to consumers. |
| 4. Support adoption and dissemination of best practices through public policy development |
| 5. Complement public policy campaigns with legal strategies to advance health system quality improvement |
| <i>Strategic Goal 4: Define Community Catalyst as a next generation advocacy leader by identifying emerging issues that are ripe for action and investing in effective and innovative strategies to address them.</i> |
| 1. Encourage and foster innovation amongst staff and programs to help Community Catalyst identify and respond to emerging issues |
| 2. Agree on the key issues going forward, the work required to move them, and the level of investment/funding. |
| 3. Explore new and innovative ways of addressing key issues, including consulting and federal grant v |
| 4. Develop a plan to acquire necessary skills. |
| 5. Develop marketing and/or fundraising strategies for each area of work. |
| 6. Utilize our DC presence to promote our issues at the federal level. |

Implementing the Community Catalyst Strategic Plan 2013-2017 – Amended 8/4/2014

| Strategic Goals/Strategies |
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| <i>Strategic Goal 1: Build a stronger advocacy infrastructure (resources, skills, relationships) to increase the power and influence of consumers in the health system nationwide.</i> |
| 1. Work to grow state-based systems of advocacy; evaluate our effectiveness and impact. |
| 2. Develop stronger support for state systems of advocacy. <ul style="list-style-type: none"> • Advocate for the importance of consumer involvement in public and private policy-making. • Highlight state groups' work and impact via stories and case studies. • Identify effective fundraising strategies to deliver resources to state groups and/or assist them in fundraising. • Provide more coaching to state partners, especially in leadership development, small business management, communications and fundraising. • Provide technical assistance to expand state organization capacities to use websites and social media to present themselves most effectively. |
| 3. Build stronger relationships among our state and local partners <ul style="list-style-type: none"> • Invigorate our Learning Community and ensure it meets the evolving needs of our partners. • Invite leadership team members who work with communities of color into the learning community. |
| 4. Develop targeted regional and other state grouping strategies that allow us to customize our work and increase its grounding and relevance. |
| 5. Articulate and further develop our DC role with regard to supporting state systems of advocacy, e.g., use our lobbyists to support states in some tangible way. |
| <i>Strategic Goal 2: Assess and develop state and local partners' capacity for organizing constituencies and campaigns for change.</i> |
| 1. Identify relevant models that can move people to engage and act on social issues and use it to guide our technical assistance. |
| 2. Develop our capacity to provide technical assistance in grassroots organizing and civic engagement, including coaching models and tracking tools |
| 3. Train state groups on population shifts and their implications; help them to use the information to make decisions on policy agendas and engagement strategies. |
| 4. Develop approaches and strategies to successfully engage new constituencies who we should target to engage in campaigns and advocacy related to the policy agenda and in influencing the environment as a result of demographic shifts (e.g., women, Latinas and seniors). |
| 5. Provide additional support to state systems of advocacy regarding the design and leadership of campaigns, both issue oriented and civic engagement. |
| 6. Develop goals for the CCAF, build out our 501(c)4 skills and capacity, and evaluate partnering with state organizations on 501(c)4 campaigns. |
| 7. Hire or otherwise obtain the skills necessary to provide technical assistance in these new areas. |
| 8. Evaluate our progress in expanding capacities and measure its impact. |

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| Strategic Goal 3: Define Community Catalyst as the next generation advocacy leader by influencing health system policies and practices to be sensitive and responsive to consumer interests and needs |
| 1. Identify emerging issues that are ripe for action, forecast opportunities that are under the radar, and invest in effective and innovative strategies to address them. – confirming change |
| 2. Foster development, adoption and dissemination of institutional and public policies that represent best practices in areas of concern to consumers |
| 3. Participate in research that evaluates health policies, practices and outcomes of interest to consumers. |
| 4. Complement public policy campaigns with strategies to advance health system quality improvement |
| 5. Utilize our DC presence to promote our issues at the federal level. |
| Strategic Goal 4: Diversify our funding sources and develop a flexible pool of resources for investment in key priorities and program development. |
| 1. Develop a business assessment and plan for generating consulting income by hiring a specialist in this area |
| 2. Identify streams of federal funds which could support our work and monitor the release of those funds, applying for funds directly or with partners |
| 3. Expand the current individual giving program through dedicated staffing |
| 4. Continue to cultivate new foundation relationships each year and deepen our existing relationships to secure funding for current and new projects |
| 5. Set annual budget goals which maintain, but do not significantly increase, Community Catalyst’s unrestricted net assets, repurposing funds that would otherwise be surplus into organizational and program investments |
| Strategic Goal 5: Invest in Community Catalyst’s staff and organizational capacity to ensure we continue to be a high-performing, effective and evolving organization. |
| 1. Continue the hiring and retention efforts started by the Employee Opportunity Committee to strengthen the organization and diversify our staff to reflect the populations we partner with across the country. |
| 2. Develop and mentor staff at every level to be the next generation of health care leaders and to strengthen future organizational leadership |
| <ul style="list-style-type: none"> • Commit to professional development resources, support learning and leadership opportunities for staff. • Develop systems and refine performance reviews to create ongoing dialogue around staff’s individual professional growth and to recognize achievements and development • Ensure training, resources, development and commitment to information management systems and technology to help us be more efficient, effective, and capture “institutional knowledge.” |
| 3. Create a stronger administrative infrastructure to support the work of the organization |
| <ul style="list-style-type: none"> • Commitment to advance information systems management across the organization, enhance our ability to access and share information quickly and respond effectively and plan for future IT needs. • Plan for expiration of office lease in October 2014. • Ensure adequate finance staff to meet the changing financial needs of the organization • Promote the partnership with HCFA and HLA |
| 4. Develop stronger administrative support for programs |

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| <ul style="list-style-type: none"> • Develop systems to support the work of program staff |
| <ul style="list-style-type: none"> • Develop a stronger program associate structure to share knowledge and learning across the organization |
| 5. Ensure our internal policies match our external guidance and advocacy efforts |
| <ul style="list-style-type: none"> • Infuse the health equity across programs and organizational policies. |
| <ul style="list-style-type: none"> • Commitment to volunteerism |
| 6. Ensure we are achieving our vision and mission by using evaluation metrics to measure our impact and to shape our future priorities and direction. |
| <ul style="list-style-type: none"> • Increase emphasis on measurable and concrete goals |
| <ul style="list-style-type: none"> • Analyze what works well, what needs to be improved and become intentional about future directions |
| 7. Create highly effective communications, management and governance and processes that support the organization's growth and ability to respond to the changing environment. |
| <ul style="list-style-type: none"> • Continue to look for ways to improve internal communications and transparency |
| <ul style="list-style-type: none"> • Encourage communications and sharing of information across programs to eliminate silos and support cross-fertilization of ideas |
| 8. Promote Community Catalyst as a leading national advocacy organization, giving consumers a voice in health care reform |
| <ul style="list-style-type: none"> • Define and build our brand |
| <ul style="list-style-type: none"> • Highlight the impact of our work |
| <ul style="list-style-type: none"> • Strengthen communications, marketing, public relations and development to effectively promote our organization. |

Community Catalyst Strategic Plan 2013-2017 Outcomes/Impacts

Strategic Goals

Strategic Goal 1: Build a stronger advocacy infrastructure (resources, skills, relationships) to increase the power and influence of consumers in the health system nationwide.

State Advocates

1. State consumer advocates are a stronger and institutionalized voice in shaping health and health system decisions in the next generation of issues.
2. State consumer advocates have diversified their partnerships and coalitions with stakeholders (communities of color, funders, and other types of organizations such as providers) in order to effectively shift to new areas of work and issues.
3. State consumer advocates have demonstrated the nimbleness and strategic flexibility to make these shifts and to receive financial support for their issue and organizing work including the staffing and capacities necessary.

Community Catalyst

4. Community Catalyst have modeled new relationships and strategies necessary to address next generation issues by building direct relationships with new and more diverse partners in the states (organizations of color, providers, and others).
5. Community Catalyst have built and adapted its learning community by being nimble enough to adapt to emerging issues and by broadening participation to other organizations. The learning community will have a much stronger component of state-initiated interactions and groupings.

Community Catalyst/State Partners

6. Community Catalyst and state partners have together engaged in active discussion and joint planning about how the state consumer health movement should move forward on new issues and strategies. These plans will be carried out in a collaborative/coordinated manner to articulate the strategic direction to funders, stakeholders and policymakers.
7. There is a more collaborative and collective effort among states to elevate models and examples of state work that can inform and help push a federal agenda (with a mix of red and blue state issues). We will also draw on our federal knowledge and cross-state view to identify strategic federal interventions for national campaigns.

Strategic Goal 2: Assess and develop state and local partners' capacity for organizing constituencies and campaigns for change.

1. Increased the capacity of state partner organizations to understand and respond to demographic shifts and have supported them to shift their policy agenda and engagement strategies accordingly.
2. Identified approaches and /or strategies to engage new constituencies in advocacy campaigns.
3. Increased the knowledge of state partners on designing and implementing issue campaigns.
4. Increased the ability of partners to connect civic engagement and health advocacy organizing.
5. Increased CC's ability to design and implement C4 campaigns by developing and/or deepening CC's relationship with 501 c4 organizations.

Strategic Goal 3: Influence health system policies and practices to be sensitive and responsive to consumer interests and needs.

1. Increase in new state and federal rules/regulations, such as require ongoing consumer participation in overseeing delivery system redesign.
2. Policies and practices at institutions such as medical centers policies are effective at reducing conflicts of interest arising from their interactions with drug and device companies, or increasing transparency in hospital reporting so that communities can evaluate how hospitals invest in improving community health and access to care.
3. Increased the knowledge of consumer advocates by conducting, translating and publishing systematic analysis of policies important to consumers (availability of low-cost drugs, adoption of consumer engagement strategies by integrated health plans serving dual eligible).
4. Increased the influence of health system policies and practices to be sensitive and responsive to consumer interests and needs by advocating at the federal level in DC.

Strategic Goal 4: Diversify our funding sources and develop a flexible pool of resources for investment in key priorities and program development.

1. Business planning assessment completed: Based on the results and recommendations of assessment, revenue generating plan in place and operational.
2. Determined the viability of federal funding as part of our overall sustainability plan, and if viable, identified relevant federal funding opportunities and begun to secure federal funds.
3. Determined the viability of individual giving as part of our overall sustainability plan, and if viable, implemented a more formal individual giving program with a growing individual donor base and increased giving.
4. Continuous expanded outreach to national and state-based funders.
5. Annual increase in solicitations to newly identified national and state-based foundations.
6. Annual increase in existing foundations giving to greater range of Community Catalyst programs.
7. Determined the ongoing robustness of foundation dollars and the extent to which we can rely on foundation dollars as our core source of support.

Strategic Goal 5: Invest in Community Catalyst’s staff and organizational capacity to ensure we continue to be a high-performing, effective and evolving organization.

Finance and Operations

1. Maintained unrestricted net assets at \$1.5M (Assessed figure annually to assure it benchmarked well against annual budget and revised as needed).
2. Identified areas of program and organizational investment during annual budget process and developed a process for SMT to select and approve organizational investment options that emerge from that process.
3. Advanced information systems management across the organization, enhanced our ability to access and share information quickly and respond effectively.
4. Planned for expiration of office lease in October 2014.
5. Reviewed and assessed the partnership with HCFA and HLA.

Programmatic /Organizational

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| 1. Increased organizational systems to support the work of program staff (administrative services, information management systems). |
| 2. All programs and services work to advance health equity for our target population and our organization. |
| 3. All programs are evaluating their programmatic goals, outcomes and impact against our 2017 strategic plan outcomes. |
| Communications and Visibility |
| 6. Developed language and materials (print and digital) that describe our work and how we do it for internal and external use across the organization. |
| 7. Community Catalyst brand and work is accurately represented and/or conveyed across various channels - new and traditional (our website, emails, blog, social media, newsletter, donor pitches, grant proposals, video, news outlets). |
| 8. Assessed and strengthened CC's brand and positioning. |
| 9. Community Catalyst website and marketing materials (one pagers, emails, video, newsletter, grant proposals and reports, donor solicitations, presentations, press materials) include current and relevant impact examples. |
| 10. Invested in new technologies and communications tools to support communications, marketing and development efforts to reach current and new audiences. |
| 11. Positioned Community Catalyst as a strong resource for communications support for the health advocacy movement. |
| Human Resources |
| 1. Diversity is reflected in the values and commitments of Community Catalyst programs and processes as evidenced by SMT and hiring managers' active responsibility for ensuring that their teams reflect the diversity of the populations we partner with and serve. |
| 2. Mentoring program is fully integrated within the organization and new staff are assigned a mentor during the first three months of their employment. |
| 3. Performance management system is fully integrated into the culture and norms of the organization with 100% participation by all staff members. |
| 4. Community Catalyst continues to evolve as a "learning organization" with 75% of staff members using at least 50% of their annual professional development resources. |
| 5. Employment benefits, policies, and practices are competitive and aligned with market standards, and reflect the needs of current staff demographics. |