

MetroWest Health Foundation Strategic Plan 2026–2031

December 2025—Final



Executive summary

This strategic plan will serve as a compass to help the MetroWest Health Foundation navigate the next five years. Our aim is to build upon the foundation's strengths while evolving the foundation's work to best meet the challenges our communities face today. The plan was developed from April - December 2025 through extensive research and deep engagement with internal and external stakeholders, including interviews and focus groups with over 75 individuals – grantees, partners, community members, philanthropic partners, experts in health equity, and members of our Board, staff, Grants Panels, and Distribution Committee.

This strategy represents an evolution, not a revolution, drawing upon the foundation's history as a trusted community partner. Stakeholders shared that the foundation's previous strategy has served the community well for over seven years – including through a global pandemic and a leadership change at the foundation – and should continue to serve as a “North Star” moving forward. At the same time, this process allowed for reflection on what has been working well and where we can evolve our work to meet today's challenges.

This strategy recommits the foundation to *who* and *what we care about* – health equity and the most vulnerable residents in our region, social determinants of health and a broad look at the systems that support or hinder health in our region.

This strategy evolves *how* the foundation works to respond to areas that are urgent and important in our current environment, bringing additional attention, focus, and funding towards equitable access to healthcare; connecting our region to statewide efforts, so that the MetroWest region is a part of state-level solutions; engaging in more trust-based ways with grantees, to enable them to flexibly adapt to best meet the needs of communities as they know best; and supporting partners to use data and come together to collectively problem solve and take action.

This strategy recommits to the foundation's unique expertise, including trusted relationships with our grantees and partners; taking a humble leadership role in the region to connect people with one another and with key issues and context; and a commitment to collecting, sharing, and convening around health data.

And, this strategy helps us to focus our work, while continuing to be responsive, nimble, and flexible as the context and community needs inevitably continue to change.

Context

Throughout the MetroWest Health Foundation (MWHF)'s more than 25-year history, we've worked alongside the MetroWest community to listen, learn, and act on what matters most for health and well-being. Along with our partners, grantees, and communities, we find ourselves in a moment of uncertainty, heightened need, and growing concern among the populations we care deeply about. **This plan builds on our strong commitment to health equity and the social drivers of health, and evolves our work to best meet the challenges in our next chapter, from 2026 to 2031.**

This plan is the result of a 9-month strategic planning process that took place over the course of 2025, guided by a Steering Committee of community members and grantees, MetroWest Health Foundation Board members, and staff; and deeply informed by input shared by dozens of grantees, partners, funders, community leaders, Distribution Committee and Grant Panel members, and individuals with expertise on issues impacting health in the MetroWest community and the Commonwealth. These individuals participated in focus groups and interviews to share their perspectives on the health and equity landscape in the region and how the foundation can most meaningfully impact change in that landscape. Along the way, the foundation shared what we learned in the process to make sure we accurately heard their perspectives and translated that information into how we will work moving forward. Information about the individuals who generously participated in this process can be found in Appendix 2.

Overview

During the strategic planning process, internal and external stakeholders validated that the foundation is a recognized and respected community leader and partner, serving as an asset to the community with several interconnected strengths:

- **Grantmaking**, which provides critical resources to community
- **Trusted, flexible relationships** with grantees and other partners
- **Staff competency** in supporting grantees, **understanding community needs**, and keeping a finger on the pulse of what is happening in health across the region
- A strong **track record** of impactful strategies, largely focusing on the right set of issues and interventions, with an important focus on **health equity and the social determinants of health**
- A commitment to the **power of accessible community data**
- The ability to **convene and connect** community organizations and players to know each other, learn, and problem solve together

Now is a time of deepening inequities; increased needs in health care, community, and social services; and an uncertain external operating environment. Stakeholders encouraged the foundation to build upon our strengths to meet the moment, to maintain our commitment to **what we do** and **who we work on behalf of**, while evolving and deepening **how we work**. We are committed to using the tools we have available – our grant and scholarship dollars,

convening power, data capabilities, voice, networks, programs, and influence – to advance our mission of building healthy, resilient, and equitable communities in the MetroWest region.

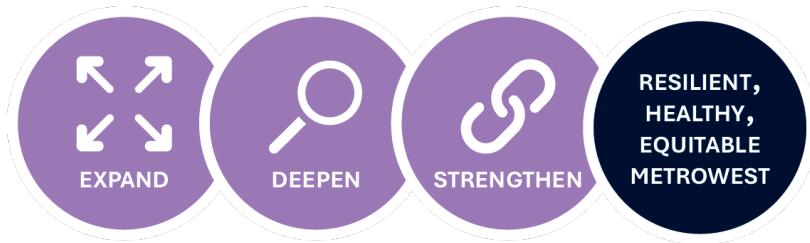
Input from internal and external stakeholders helped us better understand what we have learned over the course of our last strategic plan, which launched in 2018, and how our work must evolve in this next chapter.

In particular:

- Our **commitments to health equity** and to a **broader definition of health**, rooted in social determinants, are meaningful in changing the community conversation on health, well-being, and equity.
- An **ecosystem** view continues to be necessary because our communities' health challenges persist and disproportionately impact those most vulnerable. We must continue to aim to **shift the systems** that hold problems in place, not merely fund programmatic responses.
- Given the scale of the inequities confronting our communities and the state-level policies and funding that shape them, we must **partner regionally and at the state level to impact change in our MetroWest communities**.
- We must continue to be **nimble and responsive to community needs**, especially in a rapidly changing and uncertain environment for the organizations and individuals we care deeply about.
- We have a role to play in ensuring our grantees are set up to do the best work they can on behalf of communities. We must continue to **listen to community voices, share power, and recognize that we do not have all the answers ourselves** – and **evolve our grantmaking processes and practices to be more trusting, collaborative, and straightforward**.
- **Strengthening data, information sharing, and learning** is critical, particularly in a broader context where reliable data is increasingly questioned, less accessible, and more fragmented. We must pair our investment in **key data sets** with **increased support to partners to enable us all to collectively make sense of data, learn, and take action**.
- Our **region continues to face challenges in health care access**, including behavioral health and primary care shortages, with these likely to continue and be exacerbated in the years ahead – especially for those most vulnerable and most marginalized in our communities. We need to continue to prioritize this work.

Stakeholders urged the foundation to **maintain our multi-pronged strategic focus** on inclusive communities, effective and collaborative systems, and adaptable leaders and institutions. At the same time, we were encouraged to deepen our work in areas that are more important now than ever before. Based on these learnings, the foundation's work will evolve in three key ways, outlined in Figure 1 below:

Figure 1



Expand health care access work

We will expand our health care access work, in the face of a changing landscape around insurance access and coverage, immigration and persistent challenges to primary care. This environment demands that we partner statewide for change that will impact our region, work with trusted partners to continue to serve those community members who are most vulnerable, and seek creative solutions to shift systems.



Deepen data and convening work

We will deepen our data and convening work, investing in networks that are equipped to take action based on data. We will continue to bring stakeholders together and invest in relationships, with an increased focus on supporting organizations to make sense of data to collectively and individually take action to meet community needs.



Strengthen trust with grantees

We will evolve our grantmaking processes to enable grantees to do their best work with community, and enable us to learn what is happening in community and how we can best contribute. This may include time for planning; multi-year funding; new ways of defining and measuring progress and success; and adjustments to our grant application, review, and renewal processes.

Strategic Framework

This strategic framework will serve as a compass to help us navigate the next five years. We have recommitted to our vision of **MetroWest residents living and thriving in resilient, healthy, and equitable communities**. Achieving this vision means we will continue to take an integrated, systems-change approach, while deepening our work to create greater impact.

We believe that building a **future in which MetroWest residents live and thrive in resilient, healthy, and equitable communities** means:



Communities
that are inclusive
and equitable



Systems that are
effective and
collaborative



Leaders and
institutions that are
adaptable

The foundation's strategic framework uses these three "pillars" to organize our work – each of which have strategies to support them, described in Figure 2 below:

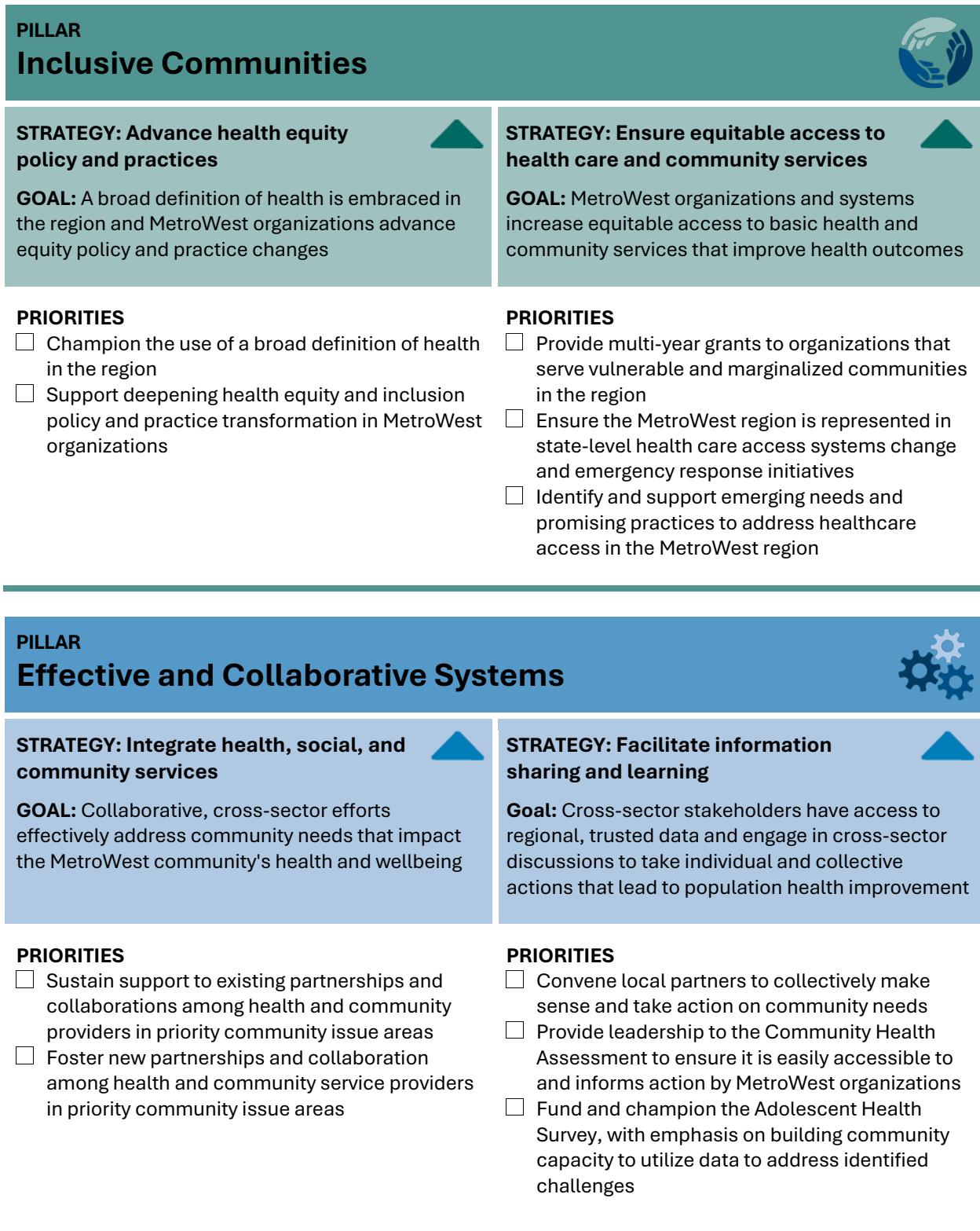
Figure 2



The pillars and strategies contained in this framework are, by design, *complementary and reinforcing*. While each strategy and activity is distinct, they are designed in a way to amplify impact across all three pillars.

Each of the pillars and strategies will be supported through **specific priorities**, which will include a mix of grantmaking and non-grantmaking roles such as *convening and sustaining collaboration, creating and sharing knowledge, influencing policy, funding scholarships, implementing leadership programs, and strengthening networks*. These specific priorities are outlined below in Figure 3, with an overview for each Pillar provided in Appendix 1. A forthcoming Implementation Plan will detail the specific action steps the foundation will take to advance each strategy, including expected outcomes.

Figure 3



PILLAR

Adaptable Leaders and Institutions

**STRATEGY: Strengthen the region's ability to adapt to meet community needs**

GOAL: Organizations in the MetroWest region collectively and individually have the capacity to respond to and meet community needs

STRATEGY: Develop resourceful and effective leaders

GOAL: The MetroWest region benefits from a bench of leaders that can navigate change while keeping community health, resilience, and equity at the forefront of decision-making and management

PRIORITIES

- Invest in the capacity of organizations to meet community needs and adapt as those needs change

PRIORITIES

- Prepare leaders to lead systems change and build healthy, resilient communities
- Strengthen the pipeline of health and social service leaders in the region with financial and other resources

Conclusion

Now is the moment for us to recommit to our focus on health equity and the social determinants of health, to bolster our grantee partners with critical financial resources, to continue to take an ecosystem approach, and to lean into a community partnership role that marshals all of our resources – financial, data gathering and sharing, convening, collaboration, and leadership – to help us meet the challenges our communities face today.

The size of the challenges that we seek to address is greater than our grant dollars alone can solve. It is clear that we cannot do this work alone, nor would we want to. Our partners bring tremendous strength, expertise, and commitment to make the work better, more rooted in community, and more sustainable for the long-term. We will continue to prioritize deepening trust, working alongside our grantees and partners to provide support, connection, and thought partnership, and to learn together. We will also work to ensure that our grantmaking processes, from application to administration to reporting, are as transparent, straightforward, and supportive as possible, to allow for our grantees to focus on their most important work – meeting the needs of our community members.

The MetroWest region is part of and impacted by a broader system in the Commonwealth and our nation. Today, it is more critical than ever for us, our allies, and our partners to be part of state-level conversations to ensure that MetroWest is represented and that change happens with MetroWest in mind.

The foundation staff, Board, and Strategic Plan Steering Committee members have communicated excitement about this new strategic plan and the opportunity it offers for the foundation to build on its success to further its commitment to building healthy, resilient communities, while deepening its work in a time of unprecedented uncertainty and need.

Successful adoption of the plan will require new mindsets, processes, and capacities from many of the foundation's stakeholders, as well as a thoughtful approach to communicating and implementing this plan. This strategic plan will be paired with an implementation plan with specific action steps the foundation will take to advance each strategy, and a communications roll-out plan.

Appendix 1. Strategic Plan Detail by Pillar

PILLAR	Inclusive Communities	
STRATEGY: Advance health equity policy and practices  GOAL: A broad definition of health is embraced in the region and MetroWest organizations advance equity policy and practice changes	STRATEGY: Ensure equitable access to health care and community services  GOAL: MetroWest organizations and systems increase equitable access to basic health and community services that improve health outcomes	

Overview

- The MetroWest region is a thriving area with many social and community resources; yet, there is inequitable access to these resources based on residents' racial, ethnic, and socio-economic backgrounds
- There are several categories of important basic needs, such as food, housing or shelter, and clothing. Because unequal or inequitable access to these resources results in predictable and preventable adverse health and wellbeing outcomes, supporting local organizations that focus on addressing these needs is important to achieving health equity. Local organizations providing basic needs to vulnerable and marginalized populations benefit from strong, trusting relationships with the community that allow them to understand root causes of challenges many of these people face
- Today, equitable health care access is more important than ever - the size of the inequities confronting our communities continues to grow. This environment demands that we partner statewide for change that will impact our region, work with trusted partners to continue to serve those community members who are most vulnerable, and seek creative solutions to try to shift the system

PILLAR

Effective and Collaborative Systems

**STRATEGY: Integrate health, social, and community services**

GOAL: Collaborative, cross-sector efforts effectively address community needs that impact the MetroWest community's health and wellbeing

STRATEGY: Facilitate information sharing and learning

GOAL: Cross-sector stakeholders have access to regional, trusted data and engage in cross-sector discussions to take individual and collective actions that lead to population health improvement

Overview

- Healthy, resilient, and equitable communities require systems that work effectively, collaboratively, and in coordination to improve individual and population health, regularly communicating and continually learning to jointly problem solve and nimbly respond to changes in the environment
- There is widespread recognition in the field that health improvement requires working beyond the health care system and engaging other actors to address structural factors that shape health status and outcomes
- Since the last strategic plan, several key community collaboratives have taken shape. These must be supported and sustained, *and* we must continue being attuned to new collaboratives that may emerge and how they can be supported
- We must pair our investment in key data sets, such as the Adolescent Health Survey and the Community Health Assessment, with increased partnership to enable us all to collectively make sense of and take individual and collective action to meet community needs

PILLAR

Adaptable Leaders and Institutions

**STRATEGY: Strengthen the region's ability to adapt to meet community needs**

GOAL: Organizations in the region collectively and individually have the capacity to respond to and meet community needs

STRATEGY: Develop resourceful and effective leaders

GOAL: The MetroWest region benefits from a bench of leaders that can navigate change while keeping community health, resilience, and equity at the forefront of decision-making and management

Overview

- The MetroWest region faces human capital challenges in the health and community service sector, with acute challenges in behavioral health, primary care and the provision of culturally competent health and social services. There is opportunity for continued investment in leaders and institutions that are effective, empower a broad range of individuals in decision-making, are adept at working with partners across sectors, and understand the importance of a systems approach
- We must evolve our approach from “innovation” and seeking out the new, to investing in stable core services and programs that are able to adapt and deliver what communities need most. To successfully support organizations to take a systems approach, shifts in our grantmaking processes and approaches are important, including time for planning, exploring multi-year funding, new ways of defining and measuring progress and success, and adjustments to our grant application, review, and renewal processes

Appendix 2. Stakeholders who participated in this strategic planning process

MetroWest Health Foundation Board of Trustees

Carol Gloff, Ph.D.
Cheryl Aglio-Girelli, DNP
Claire Levesque, M.D.*
Gillian Rattray Garcia, Esq.
Chief James Hicks
John Corron, CFP
Kathleen Herrman, Psy.D.
Lino Covarrubias
Mari Brennan Barrera*
Paula Kaminow, Esq.*
Robert Sousa, Jr., CFA
William Iberg

Foundation Staff

Angela Castrillo Vilches
Becca Donham
Kate Baker*
Maria Panasian
Phillip González*

Members of Framingham Union Grants Panel, Leonard Morse Grants Panel, and Distribution Committee

Alissa Caron, Distribution Committee
Carol Phalen, Framingham Union Grants Panel
Claudia Trevor-Wright, Esq., Distribution Committee
David Mangan, Leonard Morse Grants Panel
Ilene Hofrenning, Framingham Union Grants Panel
James Feldman, Framingham Union Grants Panel
John Krikorian, M.D., Distribution Committee
Katherine Eld, Leonard Morse Grants Panel
Laura Senier, Ph.D., Distribution Committee
Molly Ruddock, Framingham Union Grants Panel
Susan Seppa, Distribution Committee
William Graham, Esq., Distribution Committee

Additional Stakeholders

Amy Rosenthal, Health Care for All
Andrea Salzman, Wayside Youth and Family Support Network
Anna Cross*, Community Leader
Armand Pires, Medway Public Schools
Ashley Stanley, Spoonfuls
Barry Keppard, Metropolitan Area Planning Council

Betsy Soule, MetroWest Legal Services
Carlene Pavlos, Massachusetts Public Health Alliance
Christine Guthery, SPARK Kindness
Dan Shea*, Natick Service Council
David Podell, Mass Bay Community College
Diane Gould, Advocates
Hannah Frigand, Health Care for All
Isabella Caruso, Northborough Health & Human Services
Jamie Erickson, Town of Natick
Jay Kim, Community Foundation for MetroWest
Jeanne Sherlock, MetroWest YMCA
Joseph Fletcher, South Middlesex Opportunity Council (SMOC)
Julie Greiner-Ferris, Riverside Community Cares (Milford CBHC)
Kali Coughlan, Metrowest Food Collaborative
Katie Sugarman, Natick Health Department
Kristin Howard, M.D., Gratis Health
Leah Parker-Moldover, MetroWest Nonprofit Network
Liliane Costa, Brazilian-American Center BRACE
Marty Cohen, former MetroWest Health Foundation CEO
Mike Devlin, South Middlesex Opportunity Council (SMOC)
Milagros Abreu, M.D., Latino Health Insurance Program
Pooja Shah, MetroWest Public Health Shared Services
Rebecca Gallo, A Place to Turn
Reverend J Anthony Lloyd, Greater Framingham Community Church
Reyad Shah, MetroWest Chamber of Commerce
Rosie Coelho, Jewish Family Service of Metrowest
Sam Wong, Massachusetts Department of Public Health
Sara McCabe, Wayside Youth and Family Support Network
Sarah Walker, South Middlesex Opportunity Council (SMOC)
Seth Izen, MetroWest Mediation Services
Shannon Ahern, MetroWest Care Connection
Shawn McAuliffe, Hopkinton Public Health Department
Sonia Shah, Sudbury Foundation
Susan Gentili, South Middlesex Opportunity Council (SMOC)
Susan Moriarty, Edward M. Kennedy Community Health Center
Susan Nicholl, Office of Senate President Karen Spilka
Tim McDonald, Town of Needham, Health & Human Services
Viviana Vilches*, Community Leader

***Indicates Steering Committee Member**