

Healthy Lakewood Foundation 2026-2029 Strategic Plan

Executive Summary

Mission, Vision, and Values

The Healthy Lakewood Foundation champions the collective pursuit of health and wellbeing for the Lakewood community through grantmaking, resource sharing, and collaboration with local organizations. Our vision is for a Lakewood where all residents have the resources and support they need to thrive. We are guided by five core values: Equity, Community, Integrity, Learning, and Collaboration.

Organizational Foundation and Growth

Established in 2018, HLF has evolved from a startup foundation to an engaged community institution with assets growing from \$9 million in 2020 to over \$29 million in 2025. The Foundation successfully implemented its inaugural 2020-2022 strategic framework, accomplishing all directives, including the development of three grant programs (Neighborhood Opportunity, Community, and Systems Change Grants), professional staffing, and comprehensive governance structures. HLF demonstrated agility during the COVID-19 pandemic, providing over \$627,000 in COVID response funding and transitioning to two annual grant cycles while maintaining high grantee satisfaction ratings.

Strategic Positioning and Community Context

HLF operates in Lakewood, Ohio's densest city, serving a population of 50,605 characterized by significant economic and demographic diversity. Critical community challenges include housing affordability, economic disparity, with particularly acute challenges for minority residents, and transportation limitations. The Foundation's three-tiered grantmaking approach and trust-based philosophy have established it as a trusted community partner, while its growing financial capacity positions it to increase its impact significantly.

Financial Outlook

HLF's financial projections indicate robust growth over the next eight years, with an endowment expected to increase from \$29 million to \$42.7 million by 2033 – a 47% increase. The Foundation's recent shift from a 4% to a 5% spending policy reflects a commitment to greater community impact while maintaining endowment growth. Annual payouts will nearly double from \$1 million in 2026 to \$2 million by 2033, while grant budgets will grow from \$540,000 in 2025 to \$1.5 million in 2033. The final bi-annual contribution (\$4.1 million) of Lakewood Hospital Association (LHA) assets in 2026, combined with continued annual distributions of \$500,000 through 2033, ensures sustained capacity for expanded grantmaking.

Strategic Priorities: The Core of Our Plan

Priority I: Refine and Enhance Grantmaking Processes (2025 and ongoing)

Objectives: Clarify and rebrand grant programs for better community understanding, align grantmaking with community needs and health equity goals, and implement trust-based philanthropy principles.

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Priority II: Deepen Community Engagement and Partnerships (2026-2028)

Objectives: Enhance HLF's visibility as a supportive partner and convener, establish comprehensive community engagement practices fostering collaboration and shared decision-making, and define the Foundation's role as a place-based grantmaker.

Priority III: Strengthen Organizational Capacity and Learning (2026-2029)

Objectives: Enhance ability to define, understand, and communicate impact; build internal capacity for growing programs; foster organizational culture of continuous learning and informed risk-taking; assess internal committee structure for effectiveness.

Priority IV: Advance Health Equity in Lakewood (2026-2028)

Objectives: Align funding priorities with critical health factors from the Community Health Needs Assessment, invest in community-driven initiatives promoting health equity, and advocate for policies and systems changes advancing health equity.

Implementation Framework

The strategic plan is implemented through quarterly check-ins led by the Executive Committee, annual comprehensive reviews that integrate community feedback, and adaptation mechanisms to ensure relevance. A streamlined governance structure centers on four core committees: Executive, Finance, Governance, and Grants and Learning, supported by flexible task forces for specific initiatives.

HLF's impact measurement emphasizes "return on relationship" through trust-based philanthropy practices, moving from funder-centered evaluation to collaborative assessment. The Foundation will implement mutual accountability where both HLF and partners share responsibility for learning and impact, with success metrics co-created rather than imposed.

Conclusion

This strategic refresh positions HLF to further its community impact while maintaining responsive grantmaking and collaborative relationships. With substantial financial growth projected and comprehensive strategic priorities established, the Foundation is well-positioned to drive positive change in Lakewood while deepening its commitment to health equity and community partnerships. This plan represents the organization's next phase of development in practicing community leadership and taking initiative on challenging health equity issues while continuing to understand and respond to immediate community needs.