

2026-2028

STRATEGIC PLAN

The Health Policy Institute of Ohio was created in 2003 by a collaborative group of philanthropic leaders. These funders recognized the need for a statewide organization focused on independent, non-partisan health policy analysis.

HPIO's Board of Directors and staff engaged in an iterative strategic planning process throughout 2025 and early 2026. The 2026-2028 strategic plan was adopted by the board in June 2026.

Background

Dedicated to advancing the health of Ohioans through informed policy decisions, HPIO creates compelling written and online products, hosts informative educational sessions, facilitates dynamic multi-sector meetings and engages policymakers to address high-priority health topics. HPIO's independence from any sector, strong financial support from philanthropy and its knowledgeable staff enables the organization to be objective, responsive and driven by data and evidence.

HPIO provides leadership and expertise through its extensive experience in:

- **Policy research and analysis:** HPIO translates complex data and evidence into actionable policy insights. Using concise communications, data visualization, and strategic framing, HPIO ensures that research findings are accessible, relevant, and directly applicable to policy and practice.
- **Program and policy evaluation:** HPIO conducts both process and outcome evaluations to articulate and measure progress toward program and policy goals. HPIO also facilitates improvement processes and creates tools that enable other organizations to evaluate their own effectiveness.
- **Assessment and planning:** HPIO assesses the strengths and needs of our state and local communities and creates actionable plans. HPIO excels at tapping into data from public sources and insights gathered through advisory committees, focus groups, listening sessions and surveys.

Mission

Over the years, HPIO's mission statement has been updated several times as the Board has refined the organization's strategic direction. For the 2026-2028 strategic plan, HPIO's mission is **to inform data-driven policy that improves health, health equity and the value of healthcare spending**. In addition, HPIO maintains a commitment to being a non-partisan and independent voice and source of analysis and explanation.

At its founding, HPIO's mission statement was to be "... a non-partisan and independent voice and source of facts, analysis and explanation on health policy issues." The founders of HPIO further explained that "the organization will accomplish its mission through research, analysis, and communication. The organization will provide information and analysis on a broad range of healthcare issues, emphasizing those that most affect low-income and vulnerable populations."

HPIO's current mission, vision and values are aligned with this description of the organization's purpose.

Vision

HPIO's vision is that **every Ohioan reaches their full health potential**. The foundational elements of achieving this vision are that:

- **Healthcare** is accessible, timely and affordable
- **Healthcare delivery** is high-quality, effective and person-centered
- **Public health and prevention** are valued and resourced
- **Fairness, dignity and opportunity** are experienced by all people in every aspect of life
- **Community conditions**, such as housing and transportation, support health
- **Sectors that impact health** collaborate and align their work

Principles and values

HPIO's principles, which are also key elements of its mission, are:

- **Improving health**
Health is defined by the World Health Organization as "a state of complete physical, mental, and social well-being and not merely the absence of disease or infirmity." Many factors, including community conditions, access to quality healthcare, health behaviors and genetics influence health.
- **Improving health equity**
Health equity means that everyone can achieve their full health potential. This requires addressing historical and present-day injustices and removing obstacles to health and well-being.
- **Improving the value of healthcare spending**
The goal of high-value healthcare spending is to manage overall expenditure growth, reduce unnecessary spending and ensure access to affordable, high-quality care.

HPIO's values are:

- **Collaboration and inclusion**
We engage partners with diverse perspectives and experiences to ensure our work reflects the realities of Ohioans and supports effective policy solutions.
- **Integrity**
We communicate findings clearly, disclose our methods and assumptions and do not manipulate or misrepresent data.

- **Objectivity**
Our work is independent of political, commercial or sector-based interests and is driven by data and evidence.
- **Rigor**
Our work is grounded in high-quality data, research and analysis. We apply purposeful methods to produce accurate and credible insights.

Prioritized roles

HPIO provides leadership and expertise on a comprehensive range of health policy issues by performing three key prioritized roles:

Producing practical analysis

HPIO uses data and evidence to increase understanding of timely policy issues and outline related implications, next steps and realistic policy solutions for diverse audiences.

Developing clear communications

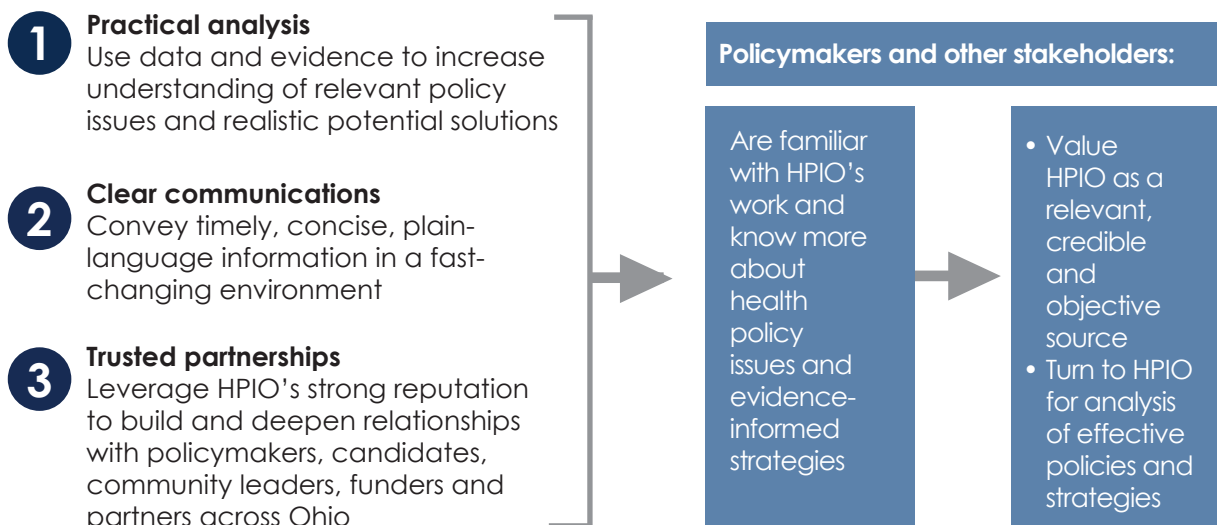
HPIO conveys its analysis using a variety of methods, including using concise, user-friendly language, compelling graphics and video and audio tools, to build knowledge of complex policy issues in a fast-changing environment.

Fostering trusted partnerships

HPIO leverages its strong reputation for relevance, independence and responsiveness to build and deepen relationships with policymakers, candidates, community leaders, funders, media and partners. This expands opportunities for collaboration and increases the likelihood of achieving desired outcomes.

Outcomes that show impact

Figure 1. HPIO prioritized roles and intended direct outcomes



As displayed in Figure 1, HPIO's intended direct outcomes are that policymakers and other stakeholders:

- Are familiar with HPIO's work and know more about health policy issues and evidence-informed strategies.
- Value HPIO as a relevant, credible and objective source.
- Turn to HPIO for analysis of effective policies and strategies.

As shown in Figure 2, by achieving these outcomes, HPIO aims to achieve the following intermediate range outcomes:

- Policymakers use HPIO's work when creating health policy.
- Other stakeholders use HPIO's work to influence the policymaking process.

HPIO's desired long-range outcomes (figure 2) are that:

- Policymakers implement data-driven policies and strategies.
- Other stakeholders implement data-driven policies and strategies.

There are many factors that affect Ohio's progress toward these long-range outcomes and ultimately to achieving the vision of every Ohioan being able to reach their full health potential. These include the political, social and cultural climate, and funding and economic trends.

While HPIO's primary focus is on public policy, policies in the private sector can also support health, and innovation in either sector can inform the other. In addition, public-private partnerships and coordinated efforts strengthen the likelihood that policies will lay a solid foundation for health.

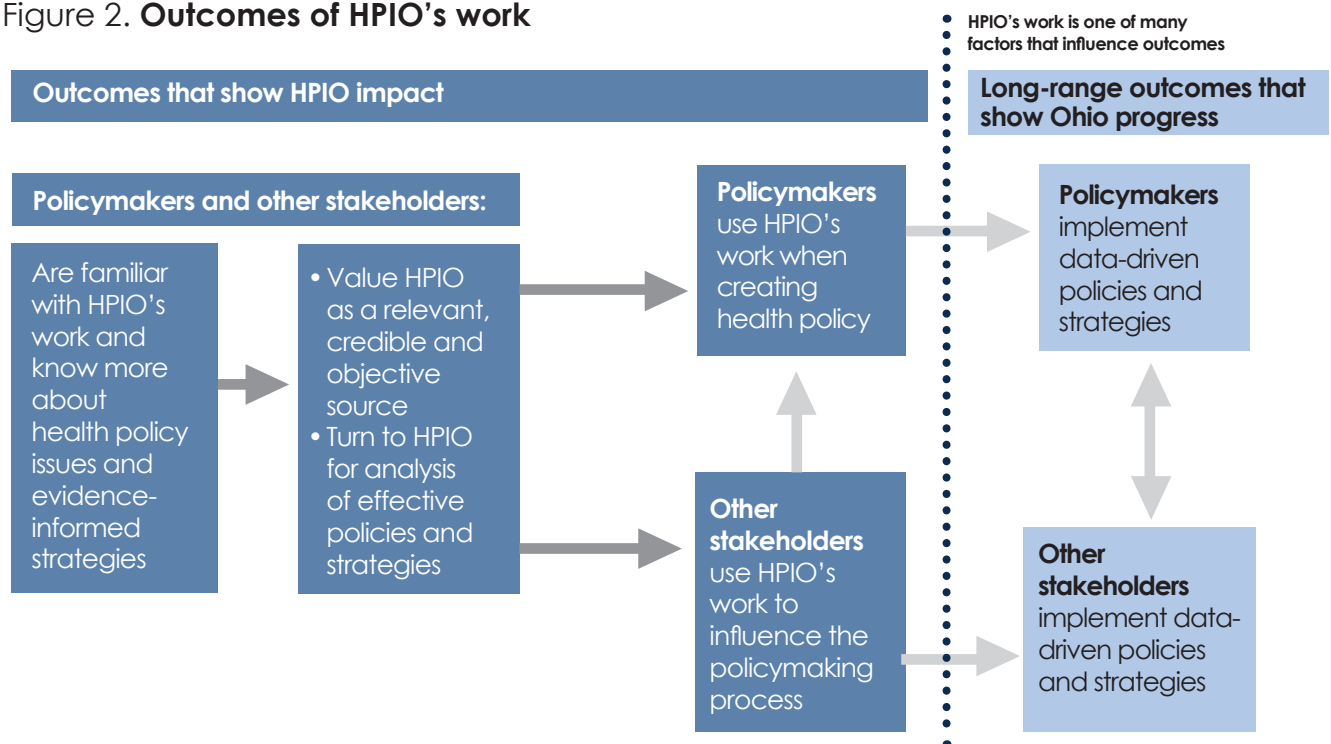
Strategic planning considerations

Throughout 2025 and into early 2026, the staff and Board of HPIO engaged in multiple conversations about the organization's assets and a variety of factors related to the current policymaking environment.

HPIO's prioritization processes have been complicated by the large volume and gravity of recent federal and state policy changes. Even so, HPIO's success in meeting the increased and time-sensitive demand for nonpartisan health policy analysis has been possible because of the following assets:

- Generous and ongoing support of philanthropy
- Reputation for providing accurate and credible policy analysis
- Increased reach in recent years through a new website, webinars and easier-to-digest products, such as data graphics
- Long-term partnerships with other organizations
- Knowledgeable and mission-oriented staff

Figure 2. **Outcomes of HPIO's work**



HPIO considered the following external factors in creating its 2026-2028 strategic plan:

- Growing awareness that state- and local-level effects of federal policy changes will unfold over a long horizon, requiring sustained attention.
- AI can be both an opportunity and a threat. AI could amplify reach and visibility but could also complicate or damage trust, credibility and information accuracy.
- Uncertainty and the need for rapid analysis is the norm, not a temporary phase.
- There's a growing tension between being responsive vs. strategic. Staff feel pressure to react but recognize that reacting to everything is unsustainable.

Considering these factors, the board discussed developing a strategic plan that provides a stable, high-level framework, while keeping implementation details adaptable so the organization can respond to unpredictable external factors. In addition, HPIO can:

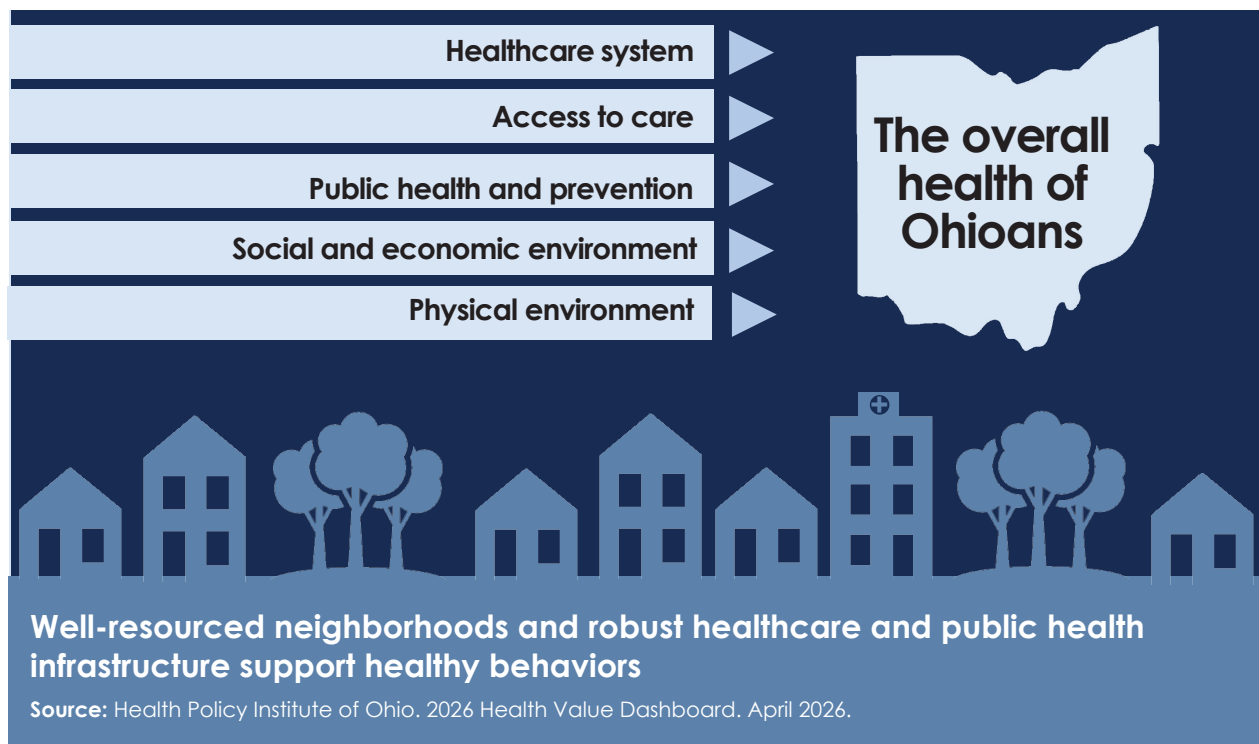
- Utilize shorter planning cycles (e.g., one-year plans within a three-year framework)
- Develop clear prioritization criteria to avoid dilution and guide when staff should act independently versus when to engage leadership or the Board.

- Prioritize stronger, earlier relationship-building with legislators and proactive and selective engagement of stakeholders.
- Account for known policy changes and their operational impact, especially in tracking funding and program implications.
- Continue to build a knowledgeable and engaged Board that reflects varied perspectives and maintains credibility, rather than one which appears self-selected or insular.
- Continue to position itself as a neutral, trusted intermediary that produces succinct and accurate analysis and can interpret, contextualize and guide decision-makers.
- Refine its intended outcomes and related metrics what is achievable in the shifting, and not always foreseeable, environmental context.

Operationalizing the strategic plan

HPIO's strategic roles (producing practical analysis, developing clear communications and fostering trusted partnerships) are accomplished through utilization of the following guidelines and creation of an annual action plan.

Figure 3. **Factors influencing the health of Ohioans**



Guidelines for selecting priority topics

Guided by the vision of every Ohioan reaching their full health potential, HPIO focuses primarily on state- and local-level public policy decisions, as well as the implications of federal policy.

HPIO's priorities continually evolve and are influenced by both internal and external factors:

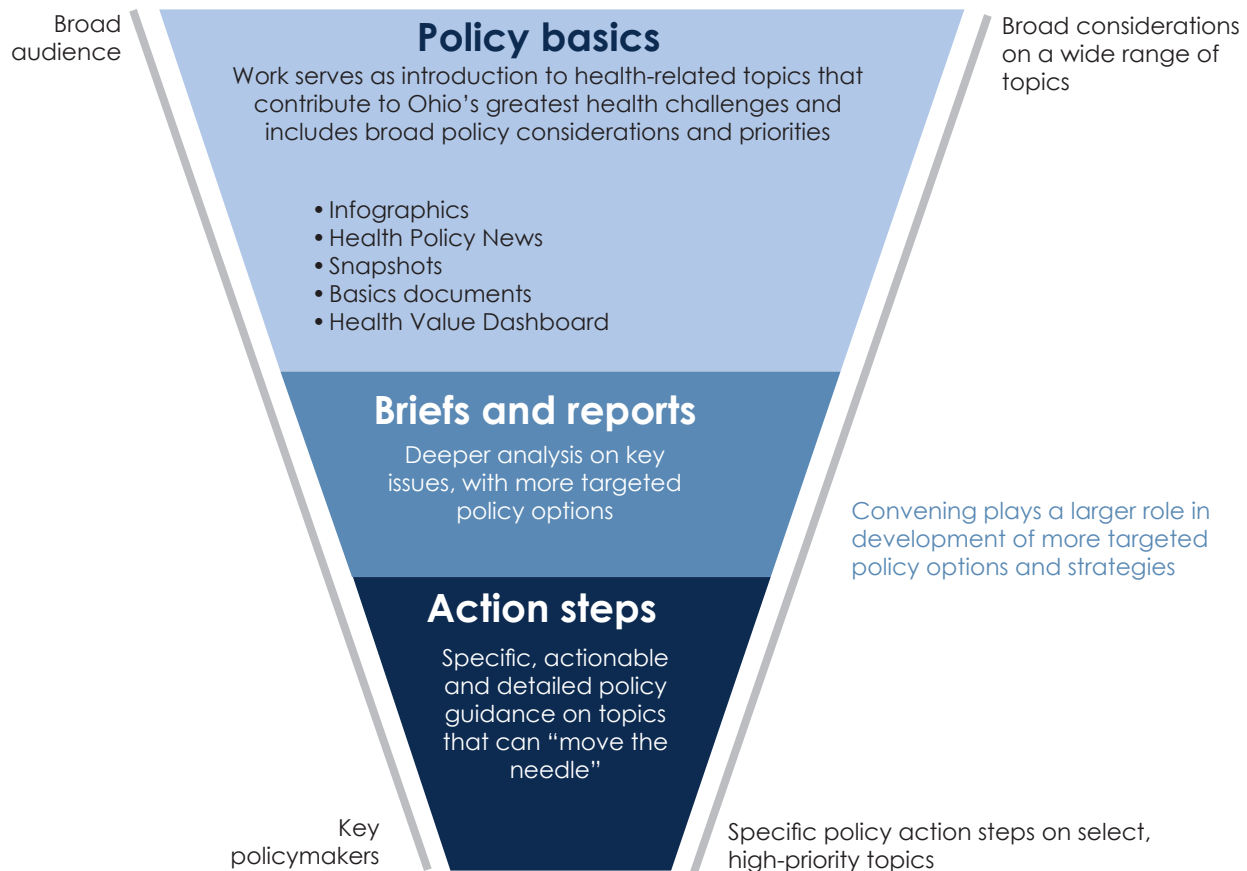
- Internal factors include capacity, funding and expertise.
- External factors include timely data, emerging evidence and knowledge of the policy ecosystem, including policymaker interests and the work of other policy organizations.

Data from the HPIO's Health Value Dashboard also guides HPIO's prioritization processes. The Dashboard, with its seventh edition released in April 2026, includes population health and healthcare spending data, as well as data related to the many factors that influence health and health care spending, as illustrated in figure 3.

HPIO focuses on addressing policies and systems that can either lay the foundation for every Ohioan to reach their full health potential or erect barriers to health and well-being. Because multiple factors influence health, HPIO's work includes a wide range of topics including healthcare access and affordability, healthcare quality, community conditions (e.g., housing, transportation, criminal justice, education) and public health and prevention.

HPIO distills complex health policy topics so that policymakers, private-sector leaders and community members have the most important data and findings at their fingertips. As displayed in figure 4, HPIO's publications provide a range of informational depth and are applicable to a variety of audiences. Some publications, such as Ohio Medicaid Basics, provide foundational information. Other publications provide in-depth analysis that illuminates the cost and benefits of policy actions.

Figure 4. Types of HPIO products



Guidelines for communicating with our audience

HPIO's mission is advanced through thoughtful analysis, communications and partnership activities. These activities are intentionally designed with HPIO's audience in mind.

HPIO defines public policymakers as its **primary audience**. This includes:

- Legislators and legislative staff
- The governor, the governor's staff and state agency leadership and staff
- Local governments, including mayors, county commissioners, health, aging and alcohol, drug and mental health boards, departments and agencies
- Health-related boards and commissions

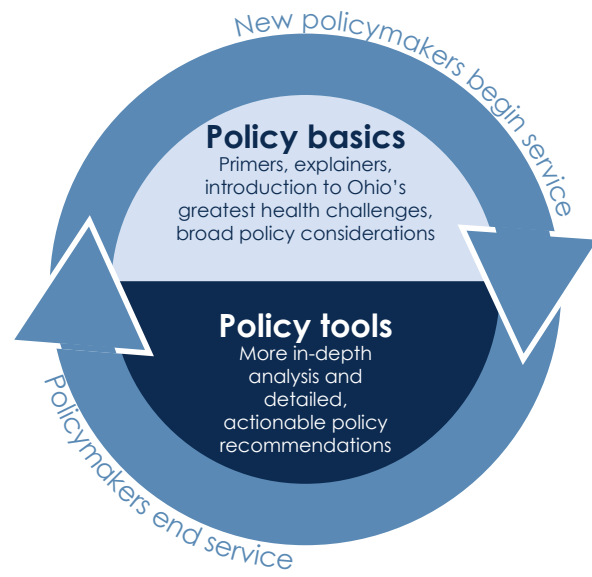
HPIO also identifies many other stakeholder groups that influence the policymaking process and use HPIO's work to inform their own policies and decision-making as its **secondary audience**, including:

- Healthcare providers (hospitals, primary care, mental health and addiction, oral health, etc.)
- Health plans/private insurers
- Nonprofit/non-governmental organizations
- General public, grassroots organizations and advocates
- Public health organizations
- Stakeholders in other sectors beyond health that have an impact on community conditions
- Researchers and academic institutions
- Health foundations and other philanthropic entities
- Business leaders
- Media

As the pace of the policymaking process has continued to accelerate and competition for the attention of policymakers has become even more intense, HPIO has adjusted its communications approach to rapidly deliver more succinct, easily digestible analysis. While the Institute still produces more in-depth analysis on priority topics and foundational "basics" documents, HPIO also regularly produces fact sheets, data snapshots, policy explainers and stand-alone data graphics on timely issues with engaging data visualizations and succinct summaries of policy considerations.

HPIO considers the needs of audiences with differing levels of expertise or experience with health policy topics. As illustrated in Figure 5, HPIO

Figure 5. Dynamics of HPIO's primary audience



develops primers and explainers describing the state's greatest challenges, which can be used by those with less knowledge or experience in health policy, including new policymakers as they orient themselves to their role. The Institute also creates more in-depth analysis and detailed policy recommendations for those with deeper knowledge of the health policy landscape, including more experienced policymakers who can use HPIO tools to develop health policy.

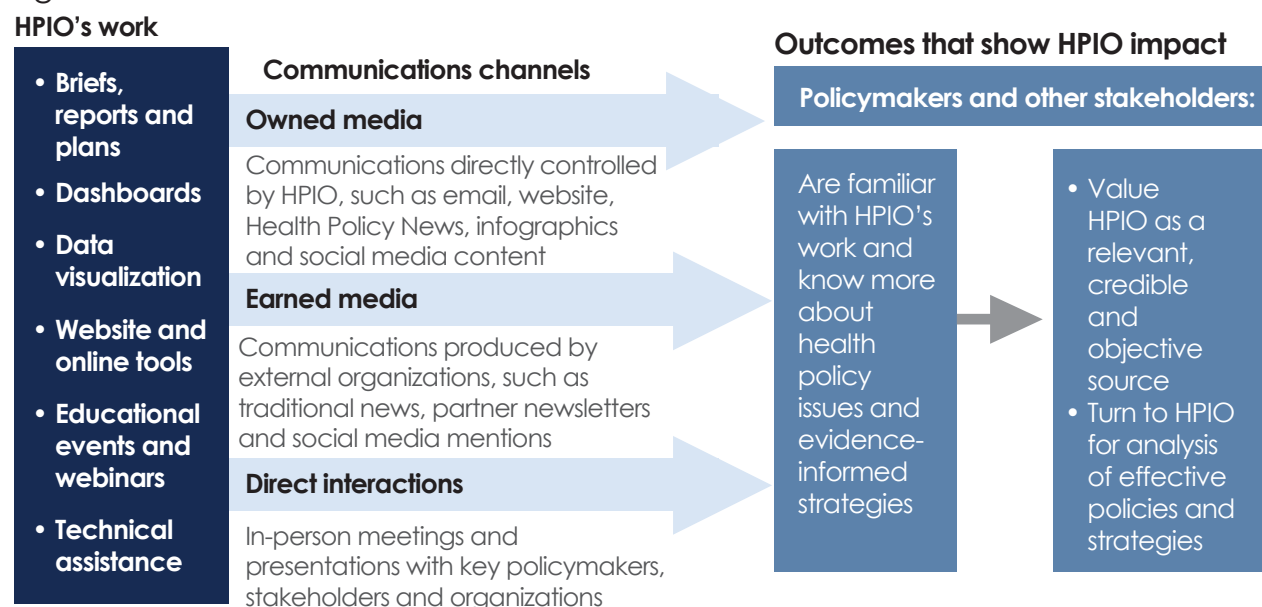
HPIO disseminates products to policymakers and other stakeholders through three primary communications channels: Owned media, earned media and direct interactions, as illustrated in figure 6. **Owned media** includes all communications channels directly controlled by the Institute, such as:

- Posting our work on the HPIO website
- Hosting educational events
- Email announcements of HPIO work
- Health Policy News updates, including standalone graphics
- Social media content produced and released through HPIO's social media platforms
- Hard-copy mailings to policymakers

Owned media provides HPIO with the greatest control over its messaging but is typically limited in reach to those who are already familiar with the Institute.

Earned media includes any time HPIO work is cited in communications from an external source,

Figure 6. HPIO communications channels



which is typically a traditional media outlet or another organization's newsletter. Earned media gives HPIO less control over messaging but provides an opportunity to expand awareness to larger audiences. Placement in external media also adds to HPIO's credibility by showing that external organizations turn to the Institute for its expertise.

Direct interactions include one-on-one meetings with policymakers and stakeholders, presentations to external organizations and participation by HPIO staff in meetings of other organizations. Direct interactions are the most time- and labor-intensive form of communication but have the greatest opportunity to build deeper connections and trust with key audiences.

As the way information is consumed continues to shift, HPIO continually monitors how it disseminates its work and balances between its primary channels, each with its own strengths and weaknesses.

Annual action plan

HPIO will create an annual action plan to translate the HPIO strategic plan into a specific set of priorities. Grounded in HPIO's mission and vision, the action plan defines the Institute's annual focus areas and deliverables. It ensures that HPIO's work remains responsive to emerging needs and serves as a roadmap for staff, partners and stakeholders to align efforts and demonstrate impact.

The following information is contained in HPIO's annual action plan:

- The Institute's **mission, vision and strategic roles** to ensure alignment
- An **overview of the current policy environment**, highlighting opportunities and threats in the policy and funding ecosystems that will impact HPIO's priorities for the year
- Annual **priority topics** selected using the priority selection guidelines on pages 4-5. The action plan includes a description of each priority topic, a list of the projects HPIO is committed to producing on that topic and a list of potential additional projects that the Institute will explore funding to support.



In 2026, HPIO's priority topics are:

- Mental health and addiction
- Healthcare access and affordability
- Child and family health
- Foundational needs for health and well-being

- Annual **priority tactics aligned to each of HPIO's strategic roles**. These tactics are selected using the priority selection and communications guidelines on pages 4-6 and further specify the types of publications, communications strategies and partnership activities on which the Institute will focus in a given year.



In 2026, HPIO's priority tactics, organized by strategic role, are:

- **Practical analysis:**
 - Policy explainers
 - Prioritized and specific policy recommendations
- **Clear communications:**
 - Very short written products
 - Short video formats
 - Weekly dissemination of health policy information
 - Maintained engagement in traditional and social media
- **Trusted partnerships**
 - Expanding the purpose of advisory groups
 - Partnering on local, in-person events
 - Increasing relationship-building activities through more in-person meetings
 - Tailored marketing
 - Building on past client relationships

- A **detailed communications and engagement plan** with information on product release and dissemination, partnerships and outreach, events and marketing
- **Operations and development needs** to support the implementation of the action plan, such as professional development priorities
- Information on **evaluation** of the action plan, which is incorporated in HPIO's robust internal evaluation and performance monitoring process

The priorities in the HPIO annual action plan are drafted in the third and fourth quarters of the prior year, and the detailed workplan and communications and engagement plan are revised throughout the year in alignment with emerging opportunities and the shifting needs of the policy environment. The action plan is a living document that the HPIO staff uses to operationalize the strategic plan throughout the year.

Organizational evaluation

HPIO tracks outputs, short-, mid- and long-range outcomes utilizing approximately 50 metrics. HPIO's annual evaluation dashboard reports data

related to these metrics and progress toward targets for the year. HPIO uses evaluation results to guide quality improvement, strategic decision making and resource development.

HPIO values evaluation because it provides an opportunity for the organization's staff and Board of Directors to reflect on what's working and what needs to be improved. The Board and staff of HPIO embrace a culture of continuous improvement and frequently identify and implement strategies to strengthen processes and increase effectiveness. In addition, evaluation is a critical way for HPIO to demonstrate accountability to funders.

HPIO evaluates both programmatic and organizational performance. Programmatic evaluation focuses on the tactics, outcomes and impact of HPIO's work. Organizational evaluation focuses on the effectiveness of staff and the Board of Directors in contributing to the mission of HPIO.

HPIO uses the following evaluation methods to collect performance data:

- Stakeholder surveys: Online survey conducted in the fourth quarter of each year
- Event evaluation surveys: Surveys administered to event participants
- Output and outcome tracking: Staff-documented data collected quarterly on HPIO activities, products, outcomes and impact

HPIO summarizes its evaluation results and impact in an annual evaluation packet shared with the Board and funders.

Resource development

HPIO strategically ensures financial stability and growth by:

- Maintaining and increasing general operating and project-specific grants
- Soliciting event sponsorships and individual contributions
- Competing for mission-relevant contracted projects

Eight funders partnered to create HPIO in 2003. Twenty-three years later, most of these foundations are among the fourteen foundations and organizations that continue to invest in HPIO's work by providing general operating support.

HPIO requests renewed support from core funders, as well as increases when possible, and continues to seek out new funders. HPIO maintains strong relationships with funders and continually communicates the impact of the organization's work through several means, including HPIO Impact and one-on-one meetings. HPIO establishes relationships and explores prospects as key resource development strategies.

In 2014, HPIO created a successful event series sponsorship program in 2014, an additional source of revenue. Beyond financial support, sponsorships provide an opportunity for HPIO to develop relationships with partners, offering the potential to convert sponsors into core funders over time. Sponsorship of HPIO events is also a way that HPIO can partner with other organizations and have visibility in the health policy arena.

HPIO solicits donations from all Board directors with the organizational goal of 100% participation from all directors. Through its annual fund solicitation, HPIO asks for financial contributions from past donors and former board directors as well as other individuals interested in HPIO's mission. When appropriate, HPIO asks donors about making a planned gift to support HPIO in perpetuity.

Thirdly, HPIO engages in contracted projects with state agencies, local government entities and private sector partners to generate revenue,

directly contribute to data-driven policy decisions in both the public and private sectors and build HPIO's expertise. HPIO bids on requests for proposals and collaboratively crafts projects in partnership with potential clients. HPIO is in the process of developing a marketing plan to take a data-informed approach to promoting its services and growing its client base by conducting targeted outreach, leveraging feedback and using what we learn to create a more effective strategy.

Previously, HPIO's approach was to build on existing relationships to provide referrals for our services, provide presentations that highlight our expertise and participate in meetings, tabling events or other convenings to increase our reach and network.

HPIO will conduct exit-interviews with past clients to identify strengths, gaps and opportunities for future partnerships. Our team will also complete interviews with a diverse group of health-related organizations across the state to better understand their unique challenges of working with contractors and assess needs and decision-drivers for selecting a contractor. From that we will perform qualitative analysis to gain insights, identify common themes and redirect our marketing tactics.

In addition to its fiduciary responsibility of ensuring the organization has sufficient funds, the Board of Directors assists the staff with the activities outlined above through donor identification, relationship-building and assistance with solicitations.



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