



Pursuing Excellence

2017-2020 Strategic Plan



Howard Brown
Health

2017-2020 Strategic Plan

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Executive Summary

Howard Brown Health's 2017-2020 strategic plan builds on the organization's recent momentum and growth across service lines, three new clinic locations, and designation as a Federally Qualified Health Center. Emerging from three years of milestones and growth, Howard Brown's new plan reflects the institution's ongoing pursuit of excellence. Among initiatives designed to strengthen clinical care, programs, and community impact, the plan commits the organization to launch a newly conceived Gender and Sexual Health Center of Excellence.

The new three-year plan outlines goals and objectives in three community-impact sections – Clinical Services; Programs and Social Services; and Education, Research, and Advocacy. Additional sections for Development/Communications and Infrastructure Support describe the administrative and planning efforts needed to mature Howard Brown as a high performing community-based healthcare provider.

Key Strategies

Clinical Services

- Increase patient access to high quality, patient-centered clinical care.
- Expand capacity for ongoing patient education and engagement.
- Grow service offerings in response to the needs and health disparities experienced by patients.

Programs and Social Services

- Cater to students and people working in service industries.
- Help patients improve their health and wellness by expanding access to needed social services.
- Make stronger connections in the community to better promote comprehensive health and wellness solutions.

Education, Research, and Advocacy

- Generate knowledge relevant to the health needs of the LGBTQ community.
- Share expertise from research, clinic, and programs, leveraging sexual and gender-related research findings.
- Address systemic barriers to healthcare in our communities through targeted advocacy efforts.

Development and Communications

- Grow the Brown Elephant social enterprise.
- Build robust giving programs.

Infrastructure Support

- Improve the appeal of service-provision and workplace environments.
- Enhance systems to attract, retain, and support talent.
- Achieve operational efficiencies by leveraging technology and best practices.

Introduction

Since its early days as a volunteer-run sexual health screening clinic, Howard Brown Health has aspired to define the optimal model of care needed by lesbian, gay, bisexual, transgender, queer people, and our allies. Over the past four decades, visibility and rights for LGBTQ people have radically improved and so have the service offerings and care philosophy pursued by Howard Brown to fulfill its mission.

The onset of the HIV/AIDS epidemic in the early 1980s challenged Howard Brown and other ally organizations to deepen their bench of expertise in areas such as social work, behavioral health, palliative and hospice care, clinical research, prevention education, case management, community mobilization, diagnostic screening, primary care, chronic disease management, and other disciplines. Faced with tremendous loss and human suffering, LGBTQ organizations innovated better approaches to community-based healthcare designed to maximize patient engagement and achieve greater health outcomes for patients. Its community-based focus enriched the model of care beyond HIV/AIDS and helped Howard Brown respond to other health disparities experienced by LGBTQ people, such as breast and cervical cancer, substance abuse, depression, smoking cessation, and access to gender affirming care.

Over the years, Howard Brown has continued to evolve its care model to better address the whole person, recognize and attend to histories of trauma and intersectional identities, and create an affirming service experience infused with community expertise and cultural humility. Howard Brown's quest to refine its model of care has contributed to its tremendous growth as a citywide medical home for tens of thousands of patients. The lessons learned at Howard Brown serve interests beyond the confines of the agency and may influence how other systems of care plan and deliver services for LGBTQ constituencies.

Most recently, Howard Brown Health has labored to improve its care quality, operations, community engagement, financial position, governance, and staff leadership. In 2016, Howard Brown added three new clinic locations, expanding its reach to the far north and south sides of Chicago. Having secured designation as a Federally Qualified Health Center in 2015, Howard Brown emerges from its recently completed 2013-2016 strategic plan as a wholly transformed entity. The new strategic plan aims to hone Howard Brown Health's model of care with new quality improvement initiatives, service offerings, and community impact goals.

Howard Brown's determination to improve remains an urgent priority so that the communities reached by Howard Brown achieve maximum health and wellness benefit.

As Howard Brown enters its 43rd year of service, the institution embarks on a new, three-year strategic plan designed to more rigorously define and achieve systemic markers for local and national recognition as a Gender and Sexual Health Center of Excellence. The continuous pursuit of excellence will help engage and support patients in the attainment of their health goals. In addition, Howard Brown will be better positioned to meaningfully contribute to the development of knowledge and dissemination of best practices locally and nationally.

Howard Brown's History: Then and Now

Founded in 1974, the organization has borne witness to innumerable challenges and opportunities, including evolving ideas about sexuality within mental health professions (the American Psychiatric Association removed homosexuality from its list of defined mental health disorders in 1973); vaccine development against Hepatitis B infection and cure treatments for Hepatitis C infection; better screening, detection, prevention, and treatments for Human Papillomavirus (HPV) and related malignancies; rapid changes in the pathogenesis, epidemiology, diagnosis, prevention, and treatment of

sexually transmitted infections, including HIV; increased visibility and specialized healthcare for transgender people; better detection and prevention in the areas of cervical and breast health; and evolutions in healthcare financing and delivery, among other changes. Thanks to scholarship in the social sciences, health disparities are better understood today than when Howard Brown was founded. Social dynamics including poverty, low educational attainment, and housing insecurity can directly affect health outcomes. The impacts of environmental and social factors on health disparities are often referred to as social determinants of health. Likewise, traumatic events and experiences of stigma and discrimination – resulting from prejudice against intersectional identities of race/ethnicity, gender, ability, sexual orientation, and nationality, among others – can contribute to both implicit and explicit healthcare bias. Individuals affected by prejudice are more likely to avoid care, experience poor treatment, or enjoy fewer health benefits than their un-maligned counterparts. In order to better serve LGBTQ people who historically have been mistreated by mainstream healthcare systems, Howard Brown has always looked to the latest medical and social sciences to formulate a uniquely affirming, informed practice.

From meager beginnings, Howard Brown today is a robust health system delivering care, research, and essential services to nearly 20,000 patients and clients. Spanning 20 miles across Chicago, Howard Brown's six clinic locations are based in five neighborhoods of documented high need: Englewood, Hyde Park, Lakeview, Rogers Park, and Uptown. One of its clinic locations, the Broadway Youth Center, caters to LGBTQ youth made vulnerable by housing instability, homelessness, or other challenges. Across locations, Howard Brown's available services include primary care, pediatric medicine, family planning and reproductive health, walk-in sexual health services, outreach and testing, women's services, chronic disease management, alternative insemination, geriatric medicine, and specialty services in viral hepatitis, transgender healthcare, adolescent medicine, biomedical HIV prevention (PrEP and PEP services), and HIV treatment and case management. Through its education and advocacy programs, Howard Brown aims to influence the ways LGBTQ people are treated in other social, personal, and institutional settings. Howard Brown accepts all forms of insurance and provides its clinical services on a sliding scale for uninsured, low-income patients. A nominal charge for a healthcare visit, including laboratory work, is \$5 to \$25. No one is denied care due to an inability to pay. Annually the organization provides an estimated \$4 million in charity care and maintains a \$70 million budget. In 2017, the organization employed more than 300 staff members including 30 medical providers and 21 behavioral health professionals.

Committing to Excellence

While the pursuit of excellence is woven throughout Howard Brown's strategic plan, the creation of the Gender and Sexual Health Center of Excellence represents a cornerstone development that will strengthen the organization's reach, impact, and influence in healthcare locally and nationally. While Howard Brown's scope is much greater, the narrow focus on sexual health and gender-affirming healthcare will ensure the endeavor results in the development of useful tools to measure impact and promote programmatic replication far and wide.

While numerous medical and academic institutions have created centers of excellence, how they are defined and constituted varies greatly. For Howard Brown, the hallmarks of a center of excellence include: (1) the provision of high quality clinical care and services; (2) rigorously reviewed standards informed by evidence and real-world experience; (3) targeted research initiatives; and (4) teaching programs to disseminate acquired knowledge and best practices. For its proposed Gender and Sexual Health Center of Excellence, Howard Brown will determine defining criteria, evaluation metrics, investigational priorities, and educational programs. It will consult existing research as well as best

practices from peer organizations and its own programs and services. The constituted virtual Center of Excellence will operate as a learning laboratory with a primary aim to provide excellent clinical care to its patients at a competitive value. In addition, the Center of Excellence will aim to advance the fields of sexual health and gender-affirming care through the experienced provision of care, research, and teaching programs.

Howard Brown's Gender and Sexual Health Center of Excellence fits within a broader tradition of healthcare centers of excellence, adopted by hospitals and academic institutions. Various medical accrediting and research bodies have defined criteria for centers of excellence to improve the care of specific medical conditions. For example, various hospitals have organized centers of excellence designed to deliver excellent surgical care at a competitive price. Academic institutions have similarly launched centers of excellence to study and advance treatment modalities for conditions such as bariatrics and cancer. Howard Brown is already distinguished as a level two Patient-Centered Medical Home by the National Committee for Quality Assurance and as a Federally Qualified Health Center by the Health Services Resource Administration, an agency of the U.S. Department of Health and Human Services. Nearly all medical providers are HIV medical specialists certified by the American Academy of HIV Medicine. Recognizing a need for benchmark standards, Howard Brown will aim to create such criteria through its Center of Excellence and hold itself accountable to meeting high standards of excellence as a premier provider of sexual health and LGBTQ specialty healthcare services.

Planning Steps

The new plan results from a yearlong planning and stakeholder engagement process involving Howard Brown's Board of Directors, Community Advisory Board, staff, patients, community members, and external data and analysis. Howard Brown formed five staff committees for each of the plan's sections named above. Each committee along with the Board of Directors and the Community Advisory Board conducted SWOT (strength, weakness, opportunities, and threats) analyses, reviewed Howard Brown aggregate healthcare data, and generated proposed goals and objectives related to their respective areas. Howard Brown held two stakeholder community meetings and polled patients and community members separately, which yielded hundreds of community responses. Howard Brown contracted with Capital Link, a non-profit consulting group, to conduct a national benchmarking study, market research report, and environmental scan to supply additional perspectives. The consulting firm Hi Q Analytics facilitated input meetings and assisted management and the Board of Directors in preparing the new strategic plan.

Overview: 2017-2020 Strategic Plan

The new plan articulates goals and objectives to evolve Howard Brown's Clinical Services; Programs and Support Services; and Education, Research, and Advocacy. In each area, Howard Brown identifies initiatives designed to claim its status as a Center of Excellence in sexual and gender-related healthcare. The plan further describes Development/Communications and Infrastructure Support initiatives to assist attainment of the plan's community impact goals.

Core themes articulated across the plan include:

- **Access:** Pursue strategies to attract and retain patients who stand to benefit from Howard Brown's affirming and nonjudgmental approaches to health and wellness;
- **Engagement:** Enhance patient communication and engagement to avail greater access and utilization of needed services;
- **Excellence:** Deliver a service experience that meets or exceeds patients' highest expectations, models best practices, and yields measurable health benefits for consumers;
- **Expansion:** Expand the array of services offered as part of Howard Brown's commitment to integrated and comprehensive care;
- **Diversification:** Diversify funding streams to weather policy and funding volatility; and
- **Dedication:** Attract and retain an excellent workforce to position Howard Brown as an employer and provider of choice for community members across the spectrum of age and income.

Purpose Driven: Mission, Vision, and Values

We recommit to Howard Brown's mission, vision, and values, which remain relevant and urgent.

Mission: Howard Brown Health exists to eliminate the disparities in healthcare experienced by lesbian, gay, bisexual, transgender, and queer people and allies through research, education, and the provision of services promoting health and wellness.

Vision: Howard Brown Health envisions a future where the health and wellness of LGBTQ people is affirmed with healthcare as a human right; where progressive social policy and enlightened societal norms uplift the lives of LGBTQ people and their families; and where affordable, accessible, and culturally competent care from non-judgmental healthcare professionals is available and provided to all who seek it.

Values:

- **Contribution:** We commit to be of service to the community.
- **Partnership:** We value and cultivate relationships to magnify our impact.
- **Interdependence:** We ground the work in the lived realities, needs, and preferences of our community.
- **Momentum:** We approach Howard Brown's work as community empowerment and social justice.
- **Transformation:** We honor each individual encounter as an opportunity to spark radical, positive change.

Clinical Services

Through a focus on innovation, quality, and growth, Howard Brown intends to expand its commitment to excellent, cutting-edge clinical services.

The mission of eliminating health disparities experienced by LGBTQ people and others who are medically underserved depends on strong clinical programs to meet patients' medical and behavioral health needs. Howard Brown continuously reviews and assesses its clinical performance and service offerings to ensure they are appropriate for the communities it serves.

Under the previous strategic plan, Howard Brown expanded its clinical footprint to the Rogers Park, Englewood, and Hyde Park neighborhoods. For thousands of patients the new sites facilitate clinical access that is closer to work or home.

In recent years, Howard Brown has enhanced care monitoring and patient satisfaction efforts to better gauge service impact and ensure services are accessible to our diverse constituents. To increase patient access, Howard Brown lowered the nominal fee charged under its sliding scale to \$5 for patients who are low-income and uninsured. Howard Brown also adopted a sliding scale fee structure for its walk-in sexual health clinic that previously operated strictly on a fixed fee-for-service basis.

The practice achieved national recognition recently by scaling the offer and acceptance of pre-exposure prophylaxis (PrEP) and post-exposure prophylaxis (PEP) to prevent the spread of HIV. By pioneering new clinical protocols to expedite access to hormone replacement therapy and other specialized services, Howard Brown became one of the nation's largest medical homes for transgender and gender-non-conforming patients. For sexually active patients, Howard Brown developed expertise providing specialized procedures such as long-acting contraceptives, colposcopy, and high-resolution anoscopy services it offers on a sliding scale. Howard Brown remains one of the largest community-based providers of sexual health and infectious disease management in Chicago. As a result of its quality initiatives, the practice has also made gains addressing depression, diabetes, and hypertension among affected patients. Over the next three years, Howard Brown will thoughtfully mine data from successful programs like these, evaluating and distributing lessons learned through the Gender and Sexual Health Center of Excellence.

Key Elements of the Clinical Services Strategic Plan

To support clinical excellence, the 2017-2020 strategic plan identifies clinical goals and objectives in three broad areas:

- Expand patient access to clinical services
- Support patient engagement
- Increase service offerings

Community stakeholders and patients informed the plan's aspirations to continue to build the size and geographic diversity of Howard Brown's clinical practice. Better patient education, communication, and engagement were deemed essential for Howard Brown to leverage greater impact. In addition, targeted expansion of new service lines will provide patients greater options to meet their complex health needs.

1. Increase patient access to high quality, patient-centered clinical care.

Howard Brown's recent growth has afforded the organization an opportunity to provide high quality medical care to more patients than ever before. Over the last three years, Howard Brown's clinical capacity increased by 50%, exceeding 27,000 patient visits per year. In 2015 alone, approximately 4,800

patients sought care at Howard Brown for the first time. The organization's impact has ripple effects across the city and region, now better positioned to reach LGBTQ people and allies on the south side and far north side of Chicago.

The organization embraces multidisciplinary healthcare and patient-centered services. Recognized by the National Committee for Quality Assurance as a Patient-Centered Medical Home since 2015, Howard Brown maximizes a team-based approach that involves behavioral health professionals and social workers as part of the care team. Howard Brown's deep integration of behavioral health consultants in its clinic settings has helped link hundreds of patients to much-needed mental health and substance abuse services.

Howard Brown is governed by its Board of Directors, a majority who are patients from the diverse racial/ethnic, gender, and generations served by the organization. The Community Advisory Board, comprised entirely of patients from diverse backgrounds, is another mechanism to ensure strategies are grounded in the realities and needs of patients. The organization also prioritizes diversity among staff to build stronger ties in the communities it serves.

1.1 Clinical Services Goal: We will pursue growth opportunities in medically underserved neighborhoods.

- Explore opportunities that help reach the south and west sides of Chicago, furthering our mission among LGBTQ, HIV-affected communities and communities of color.
- Strengthen collaboration and partnerships with social service and community-based agencies on the south and west sides of Chicago.

1.2 Clinical Services Goal: We will increase patient access to medical appointments and communication with a Howard Brown or partner provider sensitive to the needs of the LGBTQ community.

- Decrease patient wait times in the call center to no greater than 2 minutes.
- Implement additional technology options to assist patients in accessing important Howard Brown information, scheduling appointments, providing reminders, obtaining medical referrals, and locating care team staff quickly and efficiently.
- Strive to attend to patients, on average, within a 15-minute window of their scheduled appointment time, and monitor average wait-times carefully at each of our clinic locations.
- With patient feedback, pursue opportunities to make care more accessible to patients on weekends and evenings.
- Develop additional standing orders to expand nurse-driven care for routine needs in order to maximize providers' time with patients.
- Provide patients needing referrals to in-network and LGBTQ sensitive medical specialists within five workdays or less.

2. We will increase our capacity for ongoing patient education and engagement.

Howard Brown's investments in care coordination and population health strategies help address the health needs of the LGBTQ community. Over the last three years, Howard Brown led national efforts to increase access to PrEP and PEP, offering low barrier and same-day PrEP and PEP services. We successfully provided outreach to patients at highest risk of HIV transmission, engaging youth, women, and transgender/gender-non-conforming communities in conversations about PrEP, contributing to city-level decreases in new HIV infections. Howard Brown will implement further population health strategies mirroring the successful frameworks of PrEP in the areas of chronic health maintenance, cancer screening, vaccine delivery, and routine health maintenance, among others.

2.1 Clinical Services Goal: We will expand translation, sign language, and Spanish language services and create print and digital guides for patients in other languages.

- Hire additional staff equipped to provide patients with care in their requested language.
- Where staff translation is not sufficient, leverage technology to help patients with limited English proficiency to schedule appointments and communicate with staff.
- Promote expanded translation service offerings through social service partners and Howard Brown's website.

2.2 Clinical Services Goal: We will offer timely responses to patients seeking clinical guidance.

- Measure, monitor, and improve our response time for patients requesting guidance on clinical matters.
- Use root cause analysis to identify actions to decrease clinical response time, including but not limited to adjusting staffing and investing in more efficient information technology systems.

2.3 Clinical Services Goal: Facilitate stronger patient relationships between patients and their care team.

- Create patient education about team-based care so patients can fully benefit from their assigned care team.
- In the event a provider leaves the practice or a patient makes a new care-team selection, support smooth transitions so patients establish trust with their new provider and/or care team.
- Create patient education materials to help patients understand how to use the patient portal effectively so they may act as partners in their own healthcare.
- Train staff on methods to motivate patients to use this tool effectively and efficiently.
- Identify gaps in portal functionality and work with the portal developer to help improve the end user experience.

3. We will grow our service offerings in response to the needs and health disparities experienced by our patients.

Under the guidance of our last strategic plan, Howard Brown successfully expanded clinical services in pediatrics, family planning (including long acting reversible contraceptives), support services for people living with hepatitis C, and gender-affirming care, responding to the unique needs of the communities we serve. In the period ahead, Howard Brown will expand and promote the array and depth of services offered on-site at its clinic locations.

3.1 Clinical Services Goal: We will expand our commitment to prevention, treatment, and support services for people living with hepatitis C virus (HCV).

- Use our vast experience in HIV case management to develop similar models specifically for patients living with hepatitis C.
- Commit to administering cure treatments for all patients with HCV so they enjoy the best clinical outcome possible: life without HCV.
- Continue to advocate with public and private insurance carriers for lower-barrier access to HCV care and treatment regimens.

3.2 Clinical Services Goal: We will expand our capacity in sexual health, including comprehensive reproductive healthcare, family building, and comprehensive anal health services.

- Take advantage of opportunities to expand radiology services to support reproductive healthcare through mammography, ultrasound, and strengthen partnership and services with obstetricians.
- Map workflows and assess patient satisfaction to identify consumer-driven strategies to expand and improve the sexual health walk-in clinic.
- Strengthen partnerships or service offerings to support LGBTQ reproductive family building services, including doulas, infant care classes, and adoption, surrogacy, and fostering workshops.

3.3 Clinical Services Goal: We will build clinical capacity for dental and vision care, responding to the dearth of services in medically underserved communities and tailored for people living with HIV in the Chicagoland area.

- Offer onsite dental care at a clinic location on the north and south sides of Chicago.
- Strengthen partnerships with vision providers for ophthalmology/optometry care to increase access for patients.

3.4 Clinical Services Goal: We will develop long-term plans to expand access to in-house imaging services.

- Explore partnerships and grant opportunities that help us increase patient access to imaging services.

3.5 Clinical Services Goal: We will expand patient access to mental health, substance abuse, and psychiatric care through expanded organizational capacity and partnership agreements.

- Expand organizational capacity to serve more Howard Brown patients and clients in-house.
- Explore opportunities through technology to augment existing psychiatric services.
- Invest in staffing these areas to meet the growing demand for mental health services in the LGBTQ and allied communities.
- Augment training opportunities for medical providers in managing the behavioral health needs of clients, when appropriate, in the primary care setting.

3.6 Clinical Services Goal: We will strengthen family medicine offerings for patients of all ages at all clinic locations.

- Ensure that each clinic location includes medical providers experienced in caring for infants, children, and older adults.
- Develop team-based care workflows and patient education materials to support pediatric and geriatric care.

Programs and Services

At Howard Brown, we treat the whole person.

People are complex and present with not only medical and behavioral health needs but also socio-economic challenges and experiences of trauma, stigma, and discrimination, which may take priority over physical health needs. At Howard Brown, we offer holistic care tailored for marginalized populations. We affirm patients and listen to their needs without judgment.

For key populations, tailored support services help alleviate immediate needs that may become barriers to better health. For example, Howard Brown's Broadway Youth Center (BYC) supports LGBTQ young people with chronic needs including homelessness, by offering free meals, day respite services, transportation vouchers, laundry, clothing, and a safe place to shower. The tutoring program prepares young people to earn their Graduate Equivalency Diploma (GED), and social services including case management and insurance navigation, help clients gain access to income-support, housing, and insurance coverage. Young people engaged in social services are more likely to access BYC's family planning, health screenings, primary care, and behavioral health services.

Tailored programming helps Howard Brown reach marginalized groups that might not access care otherwise. For example, Howard Brown's outreach services travel citywide to offer health education and HIV screening in bars, bathhouses, and parties catering to transgender women and gay men of color— many without access to a medical home. Taking health education and services directly to people where they congregate helps build needed trust for more intensive and ongoing care relationships.

Howard Brown Health knows how to respond to the unique, ever changing needs of the community. Recently, Howard Brown started programs in the areas of sexual assault response, hepatitis C case management, and the use of innovative technology to support retention in care. Programs are regularly monitored and evaluated vis-à-vis the needs of the communities served. By continuing to align with patient needs and preferences, Howard Brown's social services, outreach, patient navigation, and community engagement programs are models of innovation, nimbleness, and creativity.

Programs at Howard Brown help engage marginalized communities in the pursuit of better health and partner with affected community members to fight for social justice. Recognizing patterns of historic disenfranchisement, Howard Brown endeavors to design programs appropriate for people of color, transgender people, cisgender women, youth, immigrants, seniors, and people with disabilities. Understanding the realities faced by patient populations is an imperative. This is why Howard Brown values community-based experience and also prepares staff in cultural humility and other strategies to successfully transmit Howard Brown's values.

To achieve programmatic excellence workers must treat patients with respect, promote cultural competence, and innovate programs and services tailored to alleviate health disparities. Howard Brown will continue to evolve its model of care adeptly with an unquestionable focus on client-centered, responsive, and relevant engagement strategies. Over the next three years, Howard Brown will continue to expand on and strengthen the integrity and impact of existing programs, with increased focus on best practices germane to sexual health and gender-related healthcare.

Key Elements of the Programs and Support Services Strategic Plan

- Cater to students and people reliant on the service economy
- Help patients attend to their socio-economic needs
- Strengthen community connections

4. Cater to students and people working in service industries.

People with nontraditional schedules and/or work environments often struggle to find a medical home suitable for their needs. Erratic schedules, fluctuating income, and specialized needs may contribute to low healthcare utilization for people who are self-employed, in school, carrying one or more part-time jobs, or working in service industries such as bars or clubs, arts/entertainment, retail, restaurants, gyms, spas, hospitality, and travel industry. Moreover, people relying on sex work for all or part of their income have unique and often unmet health needs. In the period ahead, Howard Brown will strive to better understand how work schedules impact patients' healthcare needs, designing programming and appropriate marketing for segments of this population. This aim will seek to leverage Howard Brown's unique expertise in primary care, sexual health, gender-related care, and LGBTQ-related healthcare services.

4.1 Programs and Services Goal: Conduct a needs assessment to better understand health disparities and preferences among uninsured and underinsured students and those reliant on the service economy.

- Review consumer-marketing data and poll community members from these segments to better understand opportunities and barriers to reach these groups.

4.2 Programs and Services Goal: Build expertise and programming to meet the health needs of students and service industry workers.

- Learn from existing strategies such as "After Hours" nights tailored for transgender and women's communities to inform the development of new programming aimed to increase service access to people in service industries.
- Create marketing materials designed to promote Howard Brown among college students and people in service industries.

4.3 Programs and Services Goal: Strengthen collaborations with advocacy and community groups to better reach and assist students and service industry workers.

- Enhance our listing of community providers and detail the services they offer.
- Ensure the availability of this list across the agency.
- Gauge ways to complement service offerings with partner organizations to improve services to patients.

5. Help patients improve their health and wellness by expanding access to needed social services.

Ample research on social determinants of health substantiates the correlation between patients' socio-economic conditions and their capacity to access and benefit from ongoing clinical care. Conversely, doses of social services including housing, food, transportation, childcare, and legal assistance have been shown to contribute to better healthcare utilization and improved health outcomes. Howard Brown

provides social services directly and leverages additional services via referrals and partnerships. In the period ahead, Howard Brown will strive to expand access to a variety of needed social services that support better health.

5.1 Programs and Services Goal: Strengthen partnerships with social service organizations to expand patient access to housing, food security, legal assistance, and transportation.

- Working with partner agencies, pursue funding opportunities to expand the medical-legal assistance partnership operated at Howard Brown.
- Pursue partnerships to expand housing and food security services for patients without regard to HIV status.
- Explore options to support patients with unmet transportation needs.

5.2 Programs and Services Goal: Invest in and develop mobile health programming.

- Pursue funding opportunities and partnerships to acquire and support a sustainable mobile health program.
- Establish procedures to operate, park, repair, equip, and maintain the mobile health vehicle.
- Evaluate value, outcomes, and impact of mobile services.

6. Make stronger connections in the community to better promote comprehensive health and wellness solutions.

To achieve Howard Brown's community engagement goals, the organization will work to rekindle and strengthen historic partnerships and pursue new partnerships aligned with the diverse communities it serves.

6.1 Program and Services Goal: Explore partnerships with complementary medicine and wellness offerings.

- Pursue partnerships to expand patient access to acupuncture and Chinese herbal medicine, reiki, yoga, chiropractic services, and other holistic techniques for added clinical benefit.
- Educate patients and providers on complementary medicine and case coordination techniques to better monitor the full range of treatments accessed by patients.

6.2 Program and Services Goal: Decrease barriers to care for transgender/gender non-conforming people, communities of color, and older adults through expanded care navigation and coordination services.

- Develop and provide a guide of agencies available to assist with healthcare and social services welcoming individuals regardless of race/ethnicity, gender, HIV status, insurance, and housing status.
- Train and engage staff on transgender healthcare, white privilege, and anti-oppression competencies.
- Continue to offer insurance navigation and enrollment as well as share best practices around engagement for these populations.

6.3 *Programs and Services Goal:* Recommit to the diverse women’s community, inclusive of lesbian, bisexual, queer, straight, cisgender, and transgender women, with relevant service offerings and engagement opportunities.

- Conduct a comprehensive program evaluation and community needs assessment to ensure program redesign is guided by the needs and preferences of our constituents.
- Guided by the needs assessment, achieve holistic healthcare and program offerings tailored to meet the many needs of our diverse women and femme-identified patients.
- Increase representation of women and femme-identified patients on the Board of Directors and Community Advisory Boards.
- Expand cultural and social events at multiple locations to raise visibility of Howard Brown’s comprehensive services for women.
- Increase marketing and promotion about women’s services at Howard Brown.
- Equip staff with cultural competency support to engage and affirm diverse segments of the community.

Education, Research, and Advocacy

Because LGBTQ healthcare remains largely unknown in mainstream medicine, initiatives in education, research, and advocacy remain core to expressing our mission. Healthy People 2020's¹ goals commit to more robust data collection in the areas of LGBT health to gain better insight into the unique healthcare needs, priorities, and disparities that lead to poorer health outcomes. A commitment to LGBTQ community empowerment sets Howard Brown apart from most healthcare providers and is a highly advantageous position to achieve some of the goals set forth in Healthy People 2020.

Our education programs have trained thousands of healthcare and social service providers on LGBTQ cultural competency, health topics, and patient-centered best practices. Equally impressive, the organization has participated in hundreds of clinical and behavioral research trials over the past four decades. Howard Brown advocates for inclusive health and social policy and institutional reforms on a range of topics from government appropriations and Medicaid expansion to fair and equitable coverage for hormone replacement therapy and reforms to curb gun violence. Beyond health policy, Howard Brown joins allies fighting for social justice and stronger protections for marginalized groups, such as transgender individuals, people of color, and disability communities that bear the brunt of police misconduct, hate crimes, and unequal access to opportunity.

To strengthen cross-departmental collaboration and amplify impact, Howard Brown will re-organize efforts in three domains under Howard Brown's newly created institute for Education, Research, and Advocacy (ERA). ERA will continue Howard Brown's traditions of leveraging local and national visibility and knowledge transformation around LGBTQ health topics. The re-organization will position Howard Brown to broker deeper and more meaningful partnerships with academic institutions and principal investigators to expand Howard Brown's research portfolio. Research and evaluation findings will amplify the organization's education and advocacy work.

ERA will be Howard Brown's learning hub to stimulate new ideas, test assumptions, and disseminate applied knowledge in LGBTQ-related healthcare and support services. ERA will network closely with other allied groups that are committed to evidence-informed practice to advance the LGBTQ health field. ERA will continue to reflect Howard Brown's deep commitment to community-based work, prioritizing community input, and integrating findings into Howard Brown's clinical practice. Internally, ERA will help coordinate across multiple locations and departments to ensure its work is well informed by all populations and facets of the organization.

The Gender and Sexual Health Center of Excellence will operate as a programmatic focus of ERA. This intentionally focused research, policy, and education study group will spotlight best practices in sexual health and gender-affirming care for purposes of quality assurance, broad dissemination, and replication.

Howard Brown's commitment to generating knowledge and practice transformation will galvanize greater awareness and community support for enlightened health policy and health sciences.

Key Elements of the ERA Strategic Plan

- Generate knowledge through expanded partnerships
- Share expertise

¹The Healthy People objectives, developed by the U.S. Department of Health and Human Services, are the foundation for many federal prevention initiatives.

- Address systemic barriers affecting health in our communities

7. Generate knowledge relevant to the health needs of the LGBTQ community.

Over the next three years, Howard Brown will refocus research priorities, adding key positions and developing infrastructure to support the Center for Education, Research, and Advocacy as well as expand research initiatives. This new ERA infrastructure will build upon areas of clinical and programmatic expertise in LGTBQ sexual and gender-related healthcare, in turn, fostering new research collaborations.

Howard Brown will remain committed to community-based research, reintegrating published results into our own clinic programs and practices. Howard Brown currently receives funding directly or as a sub-recipient from the U.S. Center for Disease Control and Prevention, Health Resources Services Administration, National Institutes of Health, the Chicago Department of Family and Social Services, Chicago Department of Public Health, and others. The breadth of our existing research includes multiple modalities, analyzing the efficacy of HIV prevention interventions, treatments for infectious disease, smoking cessation programming, engagement and retention in care for transgender women of color, utilization of social media as a retention tool, and clinical treatment trials for HIV and other chronic diseases. Over the next three years, we will expand on these areas, growing the body of evidence-based research in LGBTQ health.

7.1 Education, Research, and Advocacy Goal: We will establish agency-wide research priorities addressing LGBTQ community needs with input from trusted principal investigators and community members.

- Identify national gaps in LGBTQ research such as LBQ health needs, the intersection of sexuality/gender/race/ethnicity/socio-economic status as a social determinant of health, and health promotion interventions for transgender and gender-non-conforming people.
- Assess internal clinical and programmatic strengths to guide the development of Howard Brown's research priorities.
- Seek feedback from Community Advisory Board and community at large regarding research topics, methods, and dissemination.
- Utilize our rich data pool to formulate unanswered research questions in the areas of PrEP/PEP, Hepatitis C, hormone therapy, and sexual violence prevention.
- Utilize research priorities as a guide to inform which future partnerships and grant opportunities we pursue.

7.2 Education, Research, and Advocacy Goal: We will pursue stronger academic partnerships to secure support for investigations aligned with our research priorities.

- Foster partnerships with academic entities invested in Howard Brown as a partner to expand community-based research.
- Identify national principal investigators with overlapping research priorities and identify potential areas for collaboration.
- Develop a centralized dataset repository to guide partnership opportunities and facilitate high quality research.

7.3 Education, Research, and Advocacy Goal: We will strengthen human research subject protections for LGBTQ health research.

- In compliance with the new Department of Health and Human Services rule to safeguard research participants, Howard Brown's Institutional Review Board (IRB) will draft a guide to help ensure study instruments are sensitive to potentially harmful language and practices in LGBTQ research.
- Work with partnering organizations to support their IRBs in guaranteeing research practices that are inclusive of and sensitive to the needs of the LGBTQ community.

7.4 Education, Research, and Advocacy Goal: We will develop internal infrastructure to better support our education, research, and advocacy portfolio, inclusive of the Gender and Sexual Health Center of Excellence.

- Hire the vice president for the Center for Education, Research, and Advocacy.
- Under the direction of the vice president, develop and implement a budget, funding plan, and marketing strategy to support ERA growth.
- Formally constitute the Gender and Sexual Health Center of Excellence by defining criteria, scope, and evaluation methodologies based on peer-reviewed literature and applied experience and lay plans for regular evaluation, review, and reporting on the Center of Excellence's activities.

8. We will share expertise from research, clinic, and programs, leveraging sexual and gender-related research findings.

Howard Brown will build upon the success of the LGBTQ Midwest Health Symposium and Nurse's Health Education About LGBTQ Elders (HEALE) curriculum to develop LGBTQ health competency training services for health systems, healthcare professionals, and social service employees. Over the last two years, Howard Brown staff provided valuable education to over 1,500 nurses and medical assistants caring for older adults in nursing homes, primary care facilities, and hospitals around the Midwest.

Howard Brown will expand on the success of HEALE, developing more robust curricula to address LGBTQ healthcare education needs of the Midwest clinical workforce, such as sexual orientation and gender identity data collection, transgender healthcare competency, as well as research findings generated by the Gender and Sexual Health Center of Excellence.

8.1 Education, Research, and Advocacy Goal: We will develop a new business line offering consulting, professional development training, and health education, with a particular focus on sexual and gender-related healthcare.

- Expand Howard Brown's LGBTQ Symposium to better address the education needs of Howard Brown staff and allied healthcare professionals.
- Partner on other symposiums/conferences to offer our expertise in the planning and execution in order to reach a broader audience.
- Augment our HEALE curricula, addressing gaps in LGBTQ healthcare provider training, disseminating these practices through consultation services, face to face training, and training technologies.
- Invest in technology to expand our reach in LGBTQ health education.
- Develop publications through the Gender and Sexual Health Center of Excellence to drive broad dissemination of research findings and contribute to the body of evidence-based clinical and programmatic practices nationally.

8.2 Education, Research, and Advocacy Goal: We will disseminate best practices in peer reviewed journals and conferences.

- Support Howard Brown Health departments in identifying best practices and offer administrative and training support in submitting articles to peer reviewed journals.
- Identify high priority conferences, offering staff administrative and technical support to submit abstracts.

8.3 Education, Research, and Advocacy Goal: We will partner with one or more academic institutions to establish a residency-training program in LGBTQ health.

- Identify academic partners to help grow the next generation of community-based LGBTQ health providers.
- Conduct an internal assessment to determine infrastructure needs such as clinic space, scheduling needs, and training supports.

9. We will address systemic barriers to healthcare in our communities through targeted advocacy efforts.

Howard Brown's vantage point as a large LGBTQ healthcare and social service provider often enables staff to identify systemic barriers to care for patients that would be difficult for others to ascertain. The organization's robust information technology infrastructure and collection of LGBTQ health data place the organization in a unique position to advocate on behalf of our patients.

9.1 Education, Research, and Advocacy Goal: We will mine agency data for policy reports and recommendations.

- Release policy briefs informed by organizational data and the structural barriers articulated by our patients to timely policy topics.
- Partner with allied organizations to augment impact on local and national policy agendas.

9.2 Education, Research, and Advocacy Goal: We will focus advocacy efforts on patient access to sexual and gender-related healthcare including disparities in medication access through insurance.

- Develop data collection strategies in advocacy areas to link barriers, such as medication access for gender-affirming care, hepatitis C, and HIV, identified through Howard Brown clinics and programs to advocacy opportunities.
- Produce targeted press releases and statements in coordination with allied organizations to increase patient access to medications and specialty services.

Development and Communications

10. Grow the Brown Elephant social enterprise.

Howard Brown's three Brown Elephant resale stores provide the agency with a reliable source of private unrestricted revenue to support the mission. The stores reach an estimated 500,000 visitors annually in addition to the thousands who donate their gently used clothing, furniture, and housewares. The Brown Elephant's three "pick-up" trucks field a busy schedule, seven-days a week, receiving furniture donations citywide. The Brown Elephant virtual store connects with shoppers nationally in search of collectibles and unique items. Cultivating greater community and donor engagement through the chain of stores is an opportunity Howard Brown will pursue in the period ahead.

In addition, Howard Brown will use Brown Elephant stores as sites to further the organization's mission, offering more health education services and developing employment opportunities for community members. A structured program can help people prepare for workplace norms and assist them in acquiring work experience and entry-level income. Given the job assistance needs of Howard Brown patients, particularly among youth and transgender adults, a tailored program could help alleviate poverty and related health disparities.

10.1 Development and Communications Goal: Pursue opportunities to establish a new store location.

- Scout for possible locations that fit Howard Brown's business model criteria.
- Conduct a market assessment as part of business planning.
- Consider neighborhoods that could benefit from LGBTQ community health education and engagement vis-à-vis a new store location.

10.2 Development and Communications Goal: Establish an entry-level job training enterprise connected to the Brown Elephant.

- Explore partnership opportunities with experts in job training.
- Assess the capacity of stores to manage and supervise trainees.
- Pursue grant opportunities to help offset related costs.

10.3 Development and Communications Goal: Leverage the stores to expand promotion of Howard Brown's mission, services, volunteer opportunities, and development needs.

- Promote Howard Brown Health throughout store locations and window displays.
- Make brochures and collateral materials available at all store locations.
- Expand use of email to acknowledge Brown Elephant donations and in-store events and promotions.
- Utilize store locations for appropriate Howard Brown Health events and services.

10.4 Development and Communications Goal: Pursue opportunities to position Brown Elephant stores as rentable venue spaces for external events.

- Create a business models for a new line in the event venue market.
- Establish needed staffing and operational support.
- Launch a marketing campaign to attract business.

11. Build robust giving programs.

In order to realize its strategic initiatives, Howard Brown will seek philanthropic support from foundations, corporations, and individuals. The fundraising strategy will lead with transparency, fiscal and programmatic accountability, and excellent donor relations. Through a combination of tactics, Howard Brown aims to expand its donor base, build its major gifts program, and yield higher net revenue.

11.1 Development and Communications Goal: Howard Brown will enthusiastically pursue plans to increase the number of households providing annual charitable support, doubling individual giving with the implementation of a reinvigorated development program.

- Launch a recognition strategy to help identify and steward donors for annual gifts of \$5,000 or more.
- Through more aggressive marketing, attract 200 or more donors to participate in Howard Brown's monthly giving program.
- Formalize and market Howard Brown's charitable planned giving program.
- Expand donor communications and stewardship to include regular communications, invitations, and print and online donor recognition.

11.2 Development and Communications Goal: Assess the agency's five-year funding needs and conduct a feasibility study to determine fundraising potential.

- To chart long-term plans, the development department will conduct a feasibility study to better understand donor community giving priorities and familiarity and allegiance with Howard Brown's mission.

11.3 Development and Communications Goal: Establish a comprehensive marketing plan to promote agency services across all sites.

With clinic and store locations across Chicago, Howard Brown will expand its visibility through a comprehensive marketing strategy inclusive of paid and leveraged media, print and online advertising, electronic communications, outreach activities, and branded collateral materials for patients and community members.

11.4 Development and Communications Goal: Enhance the agency's website and collateral materials to support education, navigation, and engagement goals for users of Howard Brown services.

- Explore content and navigation changes to Howard Brown's website to better assist users in locating needed information.
- Continuously improve collateral materials, including brochures, palm cards, and guides to better promote agency services among diverse patient populations.

Infrastructure Support

Programs and services are made possible thanks to a strong corps of capable business professionals guiding the organization's management, planning, and day-to-day operations. Howard Brown's administrative units include finance and accounting, legal and compliance, grants management, human resources, information technology, data management, facilities, and property management. Each of these units plays an essential role supporting the necessary infrastructure to operate as a high-performing healthcare delivery system.

12. Improve the appeal of service-provision and workplace environments.

In order to establish Howard Brown as a provider and employer of choice, the organization will continue improving and modernizing facilities in order to attract new patient populations and highly qualified staff. Attributes guiding this work include:

- Environments that convey Howard Brown's affirming and nonjudgmental philosophy of care.
- Spaces that promote patient confidentiality.
- Spaces appropriate for the target populations and service offerings.
- Affordability, accessibility, and convenience.
- Spaces that reduce employee over-crowding and promote employee satisfaction.
- Where possible, spaces offering parking and easy access to public transportation.

12.1 Infrastructure Support Goal: Establish a facilities reserve fund and prioritize property maintenance and improvement needs for the next five years.

- Catalogue maintenance needs across the agency tied to target dates for work as well as lease terms, if applicable.
- Estimate future costs to maintain and improve Howard Brown facilities, furnishings, and equipment.
- Develop a comprehensive plan to address work-space over-crowding and create work environments that promote employee efficiency and satisfaction.
- Where possible, seek outside sources of support from landlords, grants, and donors to invest in upkeep and improvements for Howard Brown locations.

12.2 Infrastructure Support Goal: Develop a five-year plan for capital reserves based on a comprehensive needs assessment to determine sustainability and growth priorities.

- To sustain growth and successful operations, Howard Brown will reach the threshold of 90-days of cash-on-hand as working capital.
- Separate from working capital, Howard Brown will maintain designated reserves and investments for long-term and emergency initiatives.

12.3 Infrastructure Support Goal: Weave culture/art/LGBTQ legacy into the physical environment of care at each location.

Art can uplift, nurture, and humanize a space that might otherwise seem sterile and uninspired. The grand Roger Brown mosaic gracing the lobby of Howard Brown Health Sheridan creates a sophisticated atmosphere and sense of legacy for Howard Brown's largest clinic location. Inspired by the mosaic, Howard Brown will continue to pursue strategies to incorporate art, culture, and history into its all its spaces.

13. Enhance systems to attract, retain, and support talent.

The dedication, passion, and compassion of Howard Brown's workforce constitute its most valued resource. With emphasis on both new employees and existing employees, the development of enhanced protocols to support workforce development will be prioritized in the next three years.

13.1 Infrastructure Support Goal: Establish agency-wide secure video conferencing capabilities.

- Enable efficient teamwork across the agency by equipping each location with video-conference capabilities that help reduce staff travel time while promoting collaboration.
- Provide staff teams with training and support in utilizing software and equipment and preparing meaningful and outcome-oriented meeting experiences.

13.2 Infrastructure Support Goal: Expand on current orientation and on-boarding procedures to include several touches over the first six months of employment.

- Augment new staff member orientation with continuing education on topics such as LGBTQ health, cultural competency, and in-depth education about Howard Brown programs, services, and protocols.
- Establish regularly occurring in-house skills-building training sessions appropriate for employees at all levels.

13.3 Infrastructure Support Goal: Create and implement a comprehensive talent retention program.

To preserve organizational memory and bank investments made in staff training and development, Howard Brown will continuously assess employee satisfaction, support individuals' career development, and encourage on-the-job exposure to new skills and opportunities.

- Annually assess employee satisfaction and review results with the Board Human Resources Committee toward iteratively adapting the agency's retention plan.
- Prioritize individual supervision that helps employees succeed in their current positions and aim toward future career growth.
- Identify retention risks and leadership potential among key staff in order to design thoughtful retention strategies and succession plans.
- Ensure competitive compensation and benefits as part of a comprehensive recruitment and retention strategy.

13.4 Infrastructure Support Goal: Expand diversity and inclusion initiatives resulting in a workforce at the director and higher levels that is more closely aligned with patient demographics.

- Expand orientation and continuing education initiatives on cultural humility, confronting white privilege, Howard Brown's values, and best practices in LGBTQ health.
- Maintain a staff-led Diversity and Inclusion Committee to support policy and practice designed to recruit and retain a diverse talent pool.

14. Achieve operational efficiencies by leveraging technology and best practices.

14.1 Infrastructure Support Goal: In every business unit, improve analytics needed to inform decision-making.

- Whenever possible, mine internal data inputs to analyze performance and anticipate future performance trends.
- Benchmark performance indicators against internal historical data as well as applicable local and national data and best practice indicators.
- Support informed decision-making at all levels with data and analytics.

14.2 Infrastructure Support Goal: Develop an agency-wide paper-reduction and recycling plan.

- Assess paper-based administrative functions that could be better and more efficiently performed on an electronic platform.
- Determine budgets, criteria, and infrastructure needs for each paper-system transition as well as implementation timetables and steps.
- Ensure adequate reporting and analytic capabilities are paired with any transition away from a paper-based administrative system.

14.3 Infrastructure Support Goal: Enhance assessment tools to better identify and address dynamic business trends.

- Review operating measures quarterly with appropriate Board committees.
- With the Executive and Finance Committee, determine and regularly assess financial ratios and relevant risk/opportunity changes in the environment.
- Implement regular reporting of departmental and site financial results as an input in evaluating institutional results.
- Enhance self-auditing initiatives as part of Howard Brown's commitment to compliance.

14.4 Infrastructure Support Goal: Support program innovation, implementation, and development.

- Create a new program evaluation and innovation unit to help the social services, sexual health, and Broadway Youth Center departments assess their impact and determine program design changes likely to yield greater results in alleviating health disparities.
- Enhance communication and collaboration between administrative units including grant writing, facilities, human resources, finance, and compliance with the staffing units entrusted to operationalize restricted grant awards.

Conclusion

This strategic plan, adopted by the Board of Directors on January 30, 2017, is an aspirational expression of the goals and objectives of Howard Brown Health for the next three years. Guided by the plan, Howard Brown staff will be embarking on need assessments, mapping workflows, testing new technology, drafting procedures, mining data, and crafting detailed work plans, to operationalize as many of these goals as are feasible. Benchmarks will be determined and progress will be regularly measured and reported.

The Howard Brown Health Board of Directors and staff look forward with enthusiasm to what we will be able to achieve during this next exciting chapter of our story.

Appendix

Results from Previous Strategic Plan

Howard Brown Health successfully achieved or exceeded each of the four goals comprised of 16 objectives in its Strategic Plan for September 2013 – August 2016.

Key Achievements

- Achieved Level One Patient-Centered Medical Home (PCMH) Accreditation.
- Improved brand equity demonstrated by an expanding base of patients and clients.
- Designated as a new Federally Qualified Health Center (FQHC) in 2015.
- Designed and convened Midwest LGBTQ Health Symposium (October 2015, October 2016).
- Received funding from the Chicago Department of Public Health to provide consultation, education, and support for six months to individuals who are struggling with adherence to HIV medication and have a detectable viral load of 200 copies or above.
- Helped hundreds of people enroll in private or marketplace insurance and helped nearly 1,000 individuals become insured through Medicaid or Medicare, reducing the ranks of the uninsured and increasing community health.

Background

In August 2013, the Board of Directors of Howard Brown Health approved the Strategic Plan for September 2013 – August 2016. The plan was developed following a rigorous data gathering and analysis process. The following critical issues were used to help frame questions to internal and external stakeholders:

- Leadership and Organizational Structure
- Organizational Culture
- Mission and Program Alignment: Does our current mission, vision, and values statement accurately reflect our work?
- Branding and Community Standing
- Real Estate
- Leveraging the Affordable Care Act (ACA) and Changing Health Landscape

Goal 1: Mission and Program Alignment

Howard Brown Health will improve health outcomes through mission and program alignment, service expansion, and strategic alliances.

Goal 2: Board/Staff Development and Talent Investment

Howard Brown Health will recruit, retain, and develop a quality, diverse, and collaborative team across the organization that reflects and exceeds the needs of the community through Board and staff development.

Goal 3: Financial Sustainability

Howard Brown Health will maintain and enhance financial viability for existing commitments and future growth through improvement of service efficiency, expansion of profitable services, and increased revenue diversity.

Goal 4: Marketing and Branding

Howard Brown Health will strengthen marketing and communications efforts to attract and retain new patients and providers, increase public support, and highlight our leadership in LGBTQ culturally competent health care.

Goals and Accomplishments

Goal 1: Mission and Program Alignment

Howard Brown Health will improve health outcomes through mission and program alignment, service expansion, and strategic alliances.

- Objective 1 Establish service delivery goals by February 28, 2014 for achieving a balanced continuum of care approach, which aligns with the health center mission and maximizes mission impact.
- Outcome 1 Applied and achieved Level One Patient Centered Medical Home accreditation.
- Objective 2 Based on service delivery goals created in Objective 1, establish program health outcome metrics by August 31, 2014, to guide Continuous Quality Improvement efforts (CQI).
- Outcome 2 Established CQI goals, definitions, dashboards, processes, and staff infrastructure.
- Objective 3 By February 28, 2014 revise the Howard Brown Health mission statement to reflect the health center's work with the LGBT community and the residents of the Howard Brown medically underserved area, and align vision and values statements to mission by August 31, 2014.
- Outcome 3 Mission redraft was reviewed by the Board. Insufficient support to warrant adoption. The existing mission statement remains in place.
- Objective 4 By August 31, 2015, increase Howard Brown's ability to serve as a healthcare home throughout the lifespan by maximizing core medical services, and increasing access to targeted underserved sub-populations.
- Outcome 4 Care access and capacity improved, with patient census nearly doubling in the three-year period.
- Objective 5 Identify and establish strategic alliances by August 31, 2016, which maximize opportunities of the Affordable Care Act, and increase our mission impact.
- Outcome 5 Howard Brown established vital partnerships with Project VIDA, Test Positive Aware Network, and the University of Chicago HIV Elimination Project, among others.

Goal 2: Board/Staff Development and Talent Investment

Howard Brown Health will recruit, retain, and develop a quality, diverse, and collaborative team across the organization that reflects and exceeds the needs of the community through Board and staff development.

- Objective 1 Begin implementation of compensation and benefit strategies beginning January 2014, with full implementation completed by January 2016.
- Outcome 1 Salaries and benefits improved to market demands; healthcare premiums are substantially subsidized for low-wage workers and off-set by greater than 50% for employees.
- Objective 2 Define, develop and implement recruitment, orientation and succession strategies for new and current Board members by March 2014, with the addition of at least 10 new board members by September 2014.
- Outcome 2 The Board has expanded and achieved greater alignment with HRSA requirements. New protocols adopted for Board recruitment, retention, orientation, and evaluation.
- Objective 3 Implement staff leadership development strategies by September 2014, with an increase, year over year, in staff retention to 85%, and an increase, year over year, in staff promotion to 5%.
- Outcome 3 Annual workforce attrition is lower than goal; 5% promotions achieved.

Goal 2: Board/Staff Development and Talent Investment

Howard Brown Health will recruit, retain, and develop a quality, diverse, and collaborative team across the organization that reflects and exceeds the needs of the community through Board and staff development.

Objective 4 Strengthen Board capacity by August 31, 2014 through Board trainings and educational opportunities.

Outcome 4 New protocols were adopted for Board recruitment, retention, orientation, and evaluation.

Goal 3: Financial Sustainability

Howard Brown Health will maintain and enhance financial viability for existing commitments and future growth through improvement of service efficiency, expansion of profitable services, and increased revenue diversity.

Objective 1 By February 28, 2014, analyze Howard Brown services (medical, mental health, social services, research, and education), and provide recommendations for maximizing value of existing and potential new services.

Outcome 1 Strategies developed and successfully implemented to maximize pharmacy, insurance, and grant revenue.

Objective 2 Establish priorities by August 31, 2014 for service growth, maintenance, reduction, and elimination, in conjunction with Goal 1 Mission & Program Alignment activities.

Outcome 2 Growth and revenue strategies, including new sites, expanded encounters, and new service lines were aggressively and successfully pursued and accomplished.

Objective 3 By September 1, 2014, strengthen financial and operational management practices, and reduce risk.

Outcome 3 Howard Brown has maintained annual independent audits without material findings.

Objective 4 Strengthen Howard Brown's balance sheet by 4%, year over year, to support sustainability and expansion.

Outcome 4 Net asset position improved.

Objective 5 In conjunction with Mission & Program Alignment Goal: Objective 5, assess financial impact of strategic alliance opportunities, and support decision-making by March 2014.

Outcome 5 Priorities established for strategic alliances.

Goal 4: Marketing and Branding

Howard Brown Health will strengthen marketing and communications efforts to attract and retain new patients and providers, increase public support, and highlight our leadership in LGBTQ culturally competent health care.

Objective 1 By August 31, 2014, re-build and cultivate stakeholder relationships to increase patient acquisition, collaborations and community engagement, and to support the mission of Howard Brown. (See Mission & Program Alignment Goal, Objective 5).

Outcome 1 Community perception as measured by media, patient comments, and donor communications improved.

Objective 2 By August 31, 2015 determine, develop, and unify the Howard Brown brand to enhance public recognition and understanding, to create a cohesive, unified patient and customer experience.

Outcome 2 New logo, naming architecture, website, and brand attributes adopted.

Objective 3 By September 1, 2015 develop and implement a comprehensive, integrated marketing and communications plan.

Outcome 3 New strategies pursued to enhance social media, website, and communications.

Planning Steps

Howard Brown Health began a strategic planning process in early 2016 for the development of a new strategic plan spanning the 36 months from January 2017 to December 2019. A Strategic Planning Committee of the Board of Directors and the Howard Brown executive leadership team led the process. Capital Link was engaged to provide market assessment data. All segments of stakeholders were included in the process including: staff-led strategic planning committees, the Board of Directors, the Community Advisory Board, patients, and community stakeholders. Suzi Birz of HiQ Analytics facilitated the planning process. Input collected from the meetings and surveys were summarized and analyzed, resulting in a draft strategic plan. The draft was shared with the Steering Committee and Board Strategic Planning Committee for input. The updated draft was presented to the Board of Directors for review and approval.

Timeline and Planning Phases

- | | |
|--------------------------------|--------------------------------|
| ✓ January 2016 – April 2016 | Formative stage |
| ✓ April 2016 – May 2016 | Process planning |
| ✓ June 2016 – July 2016 | Committee and community inputs |
| ✓ August 2016 – September 2016 | Test and validate |
| ✓ October 2016 – November 2016 | Deliberate and revise |
| ✓ December 2016 – January 2017 | Approve and disseminate |

Staff-Led Strategic Planning Committees

Five areas were identified for strategic planning: Clinical Services; Programs and Support Services; Education, Research, and Advocacy; Development and Communications; and Infrastructure Services. Co-Chairs for each committee were selected to participate in the meetings, helping ensure all information was captured, and participate with the executive leadership team in drafting the plan. Throughout the process, Howard Brown engaged staff across the agency to provide critical details.

Each of the five committees participated in meetings with these objectives:

- ✓ Define an aspirational vision
- ✓ Complete a strengths, weaknesses, opportunities, and threats (SWOTs) analysis
- ✓ Detail goals and metrics

Community Advisory Board (CAB)

Two strategic planning meetings were held with the Community Advisory Board to collect their insights. The first meeting focused on collecting guidance for efforts to elicit broader community input. The second meeting was centered on Howard Brown's services. The questions posed were: what are we doing well? In what ways can we improve? What

influences an individual's ability to receive the right health services at the right time, at the right place, and by the right provider?

Board of Directors

In addition to providing vital guidance throughout the Plan's development, the Board of Directors is responsible for approving the final Strategic Plan. Throughout the process, the Board provided input on the planning process, reviewed recommendations and benchmark data, and helped shape the plan in response to inputs collected. Board members engaged in a strategic planning session during their 2016 retreat to add perspectives on the organizations' aspirational vision, complete a SWOT analysis, and brainstorm possible goals and objects for the period ahead.

Planning committees consulted aggregated service-level data from 2015 as part of their deliberations. Data sets included:

- ✓ Patient and demographic services data
- ✓ Quality of care measures
- ✓ HIV care continuum
- ✓ Hepatitis C (HCV) statistics
- ✓ Operations/care coordination
- ✓ Patients by diagnosis
- ✓ Research summary
- ✓ Patient complaint trends
- ✓ Patient satisfaction

Capital Link Data

The nonprofit consultancy group, Capital Link, analyzed select indicators against national benchmarks to measure:

- ✓ Financial ratios
- ✓ FQHC operational ratios
- ✓ Health indicators for select Chicago communities
- ✓ Policy and operational trends for FQHCs

Patient and Community Input

In-person meetings were held on the northside and the southside of Chicago to maximize the opportunity for participation. The meeting facilitator requested input on the specific questions and invited general feedback. The questions/prompts were:

- ✓ What other neighborhoods would you like to see HBH in?
- ✓ Best ways to get word out to individuals?

- ✓ Unmet health and wellness needs that exist in your community

From October 3 – November 14, 2016, Howard Brown circulated two online, anonymous surveys eliciting input from patients and community stakeholders. Eighty-four (84) individuals responded to the patient experience survey and 153 individuals responded to the community survey. In addition to demographic information, the questions included:

- Patient Experience
 - I prefer to receive updates about Howard Brown news and services via:
 - The best ways to get the word out to individuals who might also benefit from Howard Brown services include...
 - What holds you back from utilizing more of Howard Brown's services?
 - At Howard Brown, I am treated...
 - If Howard Brown were to serve as a place to train students and recent graduates pursuing jobs in medical care, would you be (likeliness to utilize Howard Brown services):
 - What unmet needs exist in your community?
- Community
 - In order to provide health and wellness services to greater numbers of LGBTQ people and allies, where might Howard Brown establish future neighborhood clinics?
 - When choosing a healthcare provider, I prioritize (please rate each characteristic)
 - Howard Brown's citywide presence allows us to advocate for programs and changes at the community level. Please rate the following ideas...
 - With more than 20,000 patients and clients and 300 staff members citywide, Howard Brown can help mobilize community members and organizations to advocate for needed public policy reforms. Please rate the following ideas...

Planning Participants

Board of Directors

Duke Alden, JD, Chair
Mark L. Hawkins, Vice Chair and Treasurer
Jeff Todd, JD, Vice Chair At-Large
Becky Rowland, Vice Chair At-Large
Roger Fierro
Bernard Mims
Chef Fresh Roberson
Ryan Siemers
Garrett Taliaferro
Miguel Torres

Emily Byrne-Driver, Executive Vice Chair
Mario Treto, Jr., JD, Vice Chair and Secretary
Bethany M. Minor, Vice Chair At-Large
Frank Buttita
Ryan T. Garrison
Kinley Preston
Robert Schultz
Fawna M. Stockwell
Nathaniel C. Thomas
Oscar Zambrano

Staff Steering Committee

Chair	David Ernesto Munar
Executive Leadership	Kristin Keglovitz-Baker Magda Houlberg, MD John McElwee Michelle Wetzal, JD
Data and Metrics Committee Co-Chairs	Andie Baker Cori Blum, MD Nick Branock Diane Burrell, JD Kenyetta Drummond Cec Hardacker Latonya Maley Vic Motherwell

Board Strategic Planning Committee

Ryan Siemers, Co-Chair
Oscar Zambrano, Co-Chair
Duke Alden, JD
Emily Byrne-Driver
Becky Rowland
Fawna M. Stockwell
Nathaniel C. Thomas
Jeff Todd, JD
Mario Treto, Jr., JD

Community Meetings

Facilitators	Myles Brady Serette King
Note takers	Kelly Sellers (Northside meeting) Alicia Williams (Southside meeting)

Writers and Editors

Andie Baker
Suzi Birz
Kristin Keglovitz-Baker
David Ernesto Munar
Nathaniel C. Thomas
Mario Treto, Jr., JD
Michelle Wetzal, JD

Clinical Services Committee

Co-chairs: Cori Blum and Nick Branock

DaVon Anderson	Anthony Armstrong	William Balsam	Erica Gaddy
Patrick Gibbons, MD	Maya Green, MD	Carla Hess	Shonita Lewis
Nikki Moody	Joanna Mruz	Carlos Orengo	Shaun'ta Whitehead

Program/Support Services Committee

Co-chairs: Latonya Maley and Vic Motherwell

Myles Brady	Kendrick Clark	Chad Hendry	Carnesha Johnson
Joey Mandeville	Amy Nicole Miller	Marissa Miller	Lyndon VanderZanden
Teyanna Veasy	Liz Weck	Alicia Williams	

Education/Research/Advocacy Committee

Co-chairs: Diane Burrell, Kenyetta Drummond, and Cec Hardacker

Kelly Ducheny	Carol Elazier	Alejandro Herrera	Kylon Hooks
Katie Jensen	Serette King	Katie Metos	John O'Hara
Katt Ross	Lia Stokes	Shena Willbrandt	

Development and Communications Committee

Co-chairs: Jade Goodwin-Carter and Joey Mandeville

Rachel Caidor	Kevin Chase	Ana Culajay	Matt Lowther
Ann McGregor	Marissa Miller	Diane Pascal	Frankie Reynolds
Erik Roldan	Lia Stokes		

Infrastructure Committee

Co-chairs: Jimm Cobb and Bill Joure

Susan Callahan	Hugh Cole	Larry Drumm	Erica McCallum
Daniel Nack	Laura Rusie	Claudia Smith	Don Trumbull
Sean Waite			



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