

Staff Leadership Transition Announced by The Health Foundation



Dr. Jan Yost



Dr. Amie Shei

The Board of The Health Foundation has approved a staff leadership transition plan with the intention of furthering its distinguished grantmaking impact in Central Massachusetts. Dr. Jan Yost, the founding President & CEO of The Health Foundation, will retire in the spring of 2022 after nearly 23 years of highly valued service. Dr. Amie Shei has been appointed as President & CEO-elect effective immediately and will fully assume the leadership role when Dr. Yost retires. Dr. Shei has been ably serving since 2016 as the Foundation's Vice President for Programs.

"The Board has implemented its succession/sustainability plan with deep appreciation to Dr. Yost for her acumen in creating and fostering the Foundation's grantmaking avenues and with the confidence that Dr. Shei will enthusiastically and effectively further our impactful grantmaking in partnership with area nonprofit organizations," stated Judge Tim Bibaud, Chairman of the Board.

Formally established with \$60 million in assets, the Foundation began its grantmaking in 2000, and since that time, it has funded its operations and awarded grants totaling over \$50 million to improve the health of those who live or work in Central Massachusetts. The Foundation's assets are currently valued at approximately \$95 million.

Known in philanthropy as a health conversion foundation, the Foundation's initial corpus resulted from the sale of Central Massachusetts Health Care, Inc., a physician-owned, not-for-profit HMO to a for-profit health insurance company. In addition to these financial assets, the Massachusetts Attorney General allowed the Foundation to maintain its predecessor's capacity as a 501 (c) (4) with a limited ability to advocate and to lobby.

Since its founding, the Foundation has adopted the World Health Organization's broad definition of health as "a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity" and has thereby focused its grantmaking on

social determinants of health rather than health care per se. Another distinguishing characteristic of the Foundation has been its reliance on leadership stepping forward from the community to identify health concerns and propose solutions, rather than the Foundation naming its funding priorities. Philanthropy has only recently begun to champion the community's voice in setting grantmaking priorities. Also distinct in the field of philanthropy has been the Foundation's recognition for its innovative evaluation tool, [Results-Oriented Grantmaking & Grant-Implementation \(ROGG\)](#), which typically also engages professional evaluators as project partners during the planning and implementation of multi-year grants, in order to increase the probability of achieving results.

The Foundation's [Synergy Initiative](#) grantmaking model was identified in 2017 as leading edge among the nation's health conversion foundations by Dr. Doug Easterling's research, "***Gaining Leverage over the Social Determinants of Health: Insights from a Study of 33 Health Conversion Foundations***," which was funded by the Robert Wood Johnson Foundation. The report recognized this Foundation among the top 33 of 240 foundations whose grantmaking is addressing the social determinants of health, an upstream approach that the Foundation began over 20 years ago that has only in recent years been embraced by national health funders, healthcare providers, and insurers. By addressing upstream social determinants of health through the Synergy Initiative approach, the Foundation has sought to improve health equity by changing policies or systems that would otherwise perpetuate inequities.

The Foundation's other primary grantmaking avenue, [the Activation Fund](#), aims to increase organizations' capacity in a way that can be sustained over time. These discrete one-year grants activate creative and innovative approaches to addressing community health concerns and have supported 98 organizations over the years.

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