



**Elizabeth Dole Foundation**  
CARING FOR MILITARY FAMILIES



# Strategic Plan



# A Letter from our CEO



When the Elizabeth Dole Foundation was first established, few Americans were familiar with the term “caregiver,” much less identified as one or understood the contributions that caregivers make to society or the hardships they face, especially those caring for wounded, injured, or ill service members and veterans.

Over the last 12 years, the Foundation has made significant strides in transforming the climate of recognition and support afforded to military and veteran caregivers. We activated some of the highest national leaders, cultural icons, and a broad coalition of partners to capture the nation’s attention, connect with millions of overlooked caregivers, produce and deliver urgent services, implement life-changing reforms, and secure the country’s largest expansion of caregiver benefits.

As we enter the next chapter of our

work, we know that the need for our leadership and commitment to our community is greater than ever. Today, one in every three adult Americans serves as a caregiver for a loved one or neighbor or friend. That means more than 105 million Americans do everything from administering medications to talking with medical providers to helping with daily tasks like bathing and dressing.

## Assessing the Need

From the RAND study we commissioned, we now know that 14.3 million of these Americans care for someone who has served in our nation’s armed forces. These caregivers come from all walks of life. They live in cities and small towns, have different racial and ethnic backgrounds, hold varying faiths and beliefs, and represent all ages. Some are thriving, and all are bringing enormous value to our economy and society, but too many are struggling. Military and veteran caregivers are at heightened risk for depression and suicide ideation; a third live at or below 130% of the federal poverty line; almost 40 percent care for both an adult and a young child; and the vast majority feel excluded from their loved one’s health care team.

## Learning from our Past

During the last year, we at the Elizabeth Dole Foundation engaged in a deliberate and forthright







examination of who we are and who we want to be as we continue to rise to this challenge. Looking back on our first twelve years, we assessed where we exceeded our goals, where we fell short, and what we learned from all of it. We solicited feedback from external partners and donors to get an objective evaluation of our strengths and areas for growth. We studied the latest research on caregiving and asked ourselves hard questions about where trends were headed and how we needed to adapt. Perhaps most importantly, we listened, as we sought input from our caregiver community—those who have the most at stake in our success.

## Envisioning our Future

The following strategic plan is an outcome of this year-long process. It is meant to be a living, breathing roadmap for the years ahead, allowing us to learn and adjust, as needed. It is also designed to focus our energies on the areas where we truly shine or, as more than one trusted partner deemed it, our “sweet spot.” Much of the progress we have made since our founding in 2012 has been through deep, trusting, and productive partnerships with individuals and organizations across the country, and that will continue to be true for our next decade. In everything we do, we will also continue to lean into the power of convening thought leaders and doers in communities small and large, embrace the importance of using research and data to guide us, and leverage the value of forging partnerships to drive innovative and lasting change.

So, this is not just a plan; it is also an invitation. Join us. Let us know where you think you can help and where, together, we can recognize, celebrate, and lift up the millions of caregivers who need our help.

With optimism and excitement for the future,

*Steve Schwab*

Steve Schwab  
CEO  
Elizabeth Dole Foundation







## Our Vision

An America where all caregivers and the people they care for thrive.

## Our Mission

To empower military and veteran caregivers, their families, and their communities through programs, partnerships, and advocacy that drive innovative, impactful, and sustainable solutions.

## Our Core Values



**Selfless Service** Through hard work, humility, and unending compassion, we will honor the remarkable sacrifices that our caregivers, their veterans, and their families have made.



**Integrity** We will uphold the highest standards of honesty, transparency, and accountability across all of our activities and interactions.



**Courage** We will boldly seek innovative solutions to complex challenges and fearlessly advocate for our community.



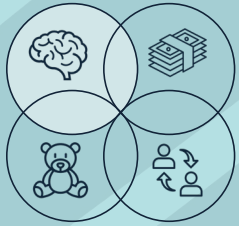


# What We Hope to Achieve



**The Elizabeth Dole Foundation has identified four key pillars that will drive our work over the next decade. Taken together, we aim to help military and veteran caregivers reach optimal physical health, psychological wellbeing, social connectedness, personal growth, and sense of purpose in life.**





## PILLAR ONE

# Strengthen Emotional and Mental Wellbeing

### Objectives

Reduce caregiver isolation and break down stigma around mental health and substance use disorders

Expand caregivers' access to mental health and wellness services

Improve mental health quality of life for military and veteran caregivers

Reduce suicide ideation among caregivers and their veterans

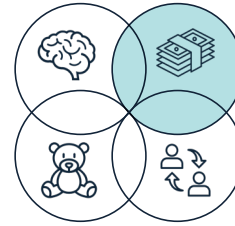
### Activities

- Leverage multichannel, interactive communication campaigns focused on reducing stigma
- Strengthen our online peer support network
- Expand use of critical financial assistance to include covering emergency mental health support
- Design and evaluate new approaches to incorporate mental health and emotional wellness services into our resource navigation program and strengthen our ties to providers who can support our community

- Advance policies and partnerships that increase health insurance options, outreach, and coverage for military and veteran caregivers
- Where there are gaps, deliver mental wellness programming online and in communities where fellows and other caregivers can be trained to provide it
- Lead management of the Face the Fight coalition and serve as a role model member of the coalition
- Design and evaluate new approaches to mental health and emotional wellness through our community-based pilot program

### Indicator of Progress

Reduced incidence of depression and suicide ideation among military and veteran caregivers



## PILLAR TWO

# Grow and Sustain Economic Mobility

### Objectives

Mitigate immediate financial crises among caregiver families

Increase caregiver financial stability

Strengthen caregivers' long-term financial viability

### Activities

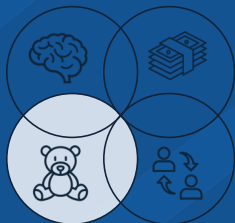
- Provide critical financial assistance through the Hope Fund
- Increase engagement with the Caregiver Financial Journey tool
- Expand our Resource Navigation Program and broaden types of resources covered to include legal services
- Launch "I am a Caregiver at Work" public awareness campaign
- Offer financial wellness programming online and in communities where fellows and caregivers can be trained to provide the programming

- Advocate for policies that enhance caregiver financial stability, such as paid family leave
- Design and evaluate new approaches to financial stability and long-term growth through our community-based pilot program

### Indicator of Progress

Increased average household income for military and veteran caregivers





### PILLAR THREE

## Improve Support and Outcomes for Caregiving Youth and Families

### Objectives

Increase nationwide identification and recognition of military and veteran caregiving youth

Expand access to education, clinical, peer support and other community-based resources

Empower military and veteran caregiving youths' abilities to identify and realize their own personal goals for lifelong success

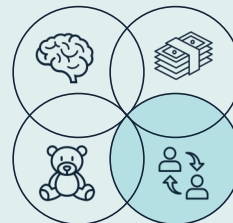
### Activities

- Launch a Hidden Helpers public awareness campaign
- Increase engagement with the Family Resource Hub
- Expand our Resource Navigation Program
- Create a Dole Caregiver Youth Fellows Program
- Host community-based caregiver family events
- Equip schools, health systems, and other community-based organizations with tools to recognize and support youth caregivers

- Advocate for enhanced family support, such as Family Resource Coordinators across VA and expanding TRICARE young adult coverage
- Lead the Hidden Helpers Coalition toward collaborative solutions
- Design and test new approaches for supporting youth, teen, and young adult caregivers through our community-based pilot program

### Indicator of Progress

Increased percentage of military and veteran caregiving kids whose needs have been met



### PILLAR FOUR

## Foster Supportive Care Ecosystems for Veterans and their Caregivers

### Objectives

Broaden the practice of caregiver-inclusive care

Expand adoption of best practices for improving quality of life for caregivers and their veterans in communities nationwide

Harness innovation in home-based and clinical care and health systems technology to connect caregivers and patients with the most useful and promising tools and technologies

Increase evidence-based understanding of caregiving through research, data collection, and surveys

### Activities

- Expand the Campaign for Inclusive Care
- Advocate for improved coverage and access to care within critical health ecosystems
- Expand our Resource Navigation Program to connect caregivers and families to available government benefits and services

- Work to make every state, county, and city a Hidden Heroes Community that implements concrete actions to prioritize and build support for military and veteran caregivers
- Partner actively with industry and government to harness innovations in support of military and veteran caregivers and their care recipients
- Commission new research
- Develop a Health Industry Caregiving Tools and Innovations Map
- Establish a new Strategy, Innovation, and Evaluation Team
- Design and evaluate new approaches for building communities of excellence and connecting caregivers to innovative technologies through our community-based pilot program

### Indicator of Progress

Improved health outcomes for caregivers and their care recipients, and reduced costs in health systems



# What's New?

- Leveraging our national network of fellows to bring programming and caregiver events into their communities
- Expanding partnerships at both the national and local levels with mental health and emotional wellness providers, as well as financial institutions
- Growing our Resource Navigation Program
- Broadening our use of emergency financial assistance
- Launching a Hidden Helpers public awareness campaign
- Creating a Youth Dole Caregiver Fellows Program
- Establishing an EDF Strategy, Innovation, and Evaluation Team
- Building on the success of our existing Hidden Heroes Cities, Counties, and States program by setting criteria that participating communities meet to deliver improved support for military and veteran caregivers in those communities

## Establishing a Community-Based Pilot Program

We know through our own work and from listening to and learning from our community and the researchers we partner with that so many of the challenges military and veteran caregivers face are inter-connected. They compound one another and so must be tackled as “problem knots,” rather than single, standalone problems. Think of the caregiver who is struggling to put food on the table and to take care of both a veteran and young children, all while experiencing frustrating barriers to care at a local clinic. What kind of impact do these responsibilities and these challenges have on that caregiver’s mental and emotional wellbeing? On the children? On the veteran?

EDF’s new community-based pilot program is designed to drive innovation in addressing problem knots holistically. Beginning with one carefully-selected community, EDF will partner with local caregivers, nonprofits, educational and faith institutions, community leaders, government officials, health systems, and other corporate entities to conduct a needs assessment specific to military and veteran caregivers in that community and



to design and implement multi-faceted, multi-sector partnerships and programming tailored to that community. This model will address the social determinants of health in that community by targeting existing barriers to positive health outcomes and forming partnerships with community-based organizations and individuals to break down those barriers. It will also allow us to test new types of programming for our community, such as specialized coaching for young adults who are ready to enter the workforce, and one-on-one support for caregivers to design long-term financial plans, like retirement and college saving plans.







## A Careful, Phased Approach, Grounded in Sound Monitoring, Evaluation, and Learning Practices

In beginning to implement this strategic plan, we will embrace three core tenets. We will take a phased approach; we will monitor, evaluate, and learn as we go; and we will adjust to emerging needs of our community.

provided programming and events for caregivers and their families.

Likewise, Year 1 of the community-based pilot program will entail identifying and selecting the first community, securing partnership from local caregivers and community-based entities and, possibly, completing the needs

### A Phased Approach

As we expand our work in new ways, we will take a cautious, incremental approach.

In Year 1, we will deploy EDF staff to two carefully-selected locations, where they will both deliver programming and train Dole Caregiver Fellows in those communities to provide that training. As resources grow, and more caregivers get trained, we anticipate increasing the number of communities with caregiver-





assessment. Year 2 will consist of designing partnerships and programming based on that needs assessment and beginning to implement it. Based on our experience in that initial community and what we learn about resources required, we will determine the number of additional communities we can expand to in Year 3 and beyond.

We will also replicate and broadly distribute the tools and interventions that we find are most successful and that can be easily used by other communities, even if they are not participants in the pilot program.

## Monitoring, Evaluating, and Learning

The concrete, measurable, and meaningful goals that we have identified for each pillar will help us monitor our progress in achieving our overarching goal of reducing caregiver burden. Undergirding this evaluative framework will be performance metrics for each

activity, aligned with at least one objective. We will be dogged in assessing how we are performing and learning from what works and what doesn't work. Through our new Strategy, Innovation, and Evaluation Division, we will test, we will evaluate, we will learn, and we will modify.

## Responding to Changes

The world we live in is dynamic and ever-evolving, and so often military and veteran families are the first to see or feel the brunt of change, whether it comes in the form of a new (or ending) military conflict or economic disruption or policy upheaval. As we move forward in implementing our plan, we will maintain our ability to be nimble, responding to developments that affect our community and adjusting and reprioritizing, as needed.



## Learn More

To learn more about the Elizabeth Dole Foundation and how you can support our work, please visit [www.elizabethdolefoundation.org](http://www.elizabethdolefoundation.org) and sign up to receive regular communications from us.



**The Elizabeth Dole Foundation's mission and programs would not be possible without the generous support of our donors, partners, and the leadership of our incredible Board of Directors.**

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