

# San Joaquin Valley Health Fund: Its Origins, Progress, and Future

A Description of the San Joaquin Valley Health Fund's Model

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# Introduction

## Background

The San Joaquin Valley Health Fund's vision is a "Golden State for all."

The nine counties in California's San Joaquin Valley are home to four million people, and the region represents one of the most diverse and economically important parts of California. Yet, the Valley's high rates of poverty and poor health can make this vision of California as a "Golden State" feel far from reality for many residents.

Responding to both the Valley's potential and its challenges, Sierra Health Foundation launched the San Joaquin Valley Health Fund (the Fund) in 2014, with The California Endowment as a first co-funder. The Fund is an ambitious and innovative effort to invest in the health and well-being of San Joaquin Valley residents by supporting organizations and community residents advocating for health and racial equity. With a "community-first" approach, the Fund is a unique model for seeding a movement for change that has brought investments, attention, and capacity-building resources to the San Joaquin Valley. Under the management of The Center at Sierra Health Foundation, the Fund has offered grants to local organizations pursuing work that addresses the underlying policies and systems that lead to poor health and lack of opportunity. In addition, the Fund has worked with organizations to ensure they have the skills and resources they need to make those policy efforts successful.

Today, the San Joaquin Valley Health Fund is a network of 90 community nonprofit partners and 18 funders working towards shared goals that advance health and racial equity in the region. Since 2014, over \$6 million has been invested in the Valley, bolstering the work of these local nonprofit organizations while also strengthening the network that can mobilize for change. If the Fund is successful, the San Joaquin Valley will have the infrastructure, relationships, policies, and unified voice needed to achieve this vision of a "Golden State for All."

Looking back at the Fund's first years, The Center recognized the potential for this approach to be used by other organizations working to address health and racial inequity. Therefore, The Center sought to chronicle the Fund's trajectory, including its key elements, early successes and lessons learned. By bringing its approach into focus, The Center also aspired to inform the Fund's management while providing guidance to others who want to create policies and systems that promote health and racial equity.

To do this, The Center partnered with Harder+Company Community Research in 2017 to capture the Fund's origins, progress, and future opportunities. Harder+Company and The Center reached out to funder partners, community partners, and other key stakeholders in the San Joaquin Valley to hear their perspectives on the Fund's development (see Appendix for a complete description of methods). Drawing on the collective insights of these partners, this report highlights the impetus for the San Joaquin Valley Health Fund, key elements of its approach, accomplishments from its first four years, and opportunities for strengthening and growing the model in the future. 🏠

### **Mission of the San Joaquin Valley Health Fund**

*The San Joaquin Valley Health Fund strengthens the capacity of communities and organizations in the San Joaquin Valley to improve health and well-being by advancing programs and policy changes that promote community health and health equity for all.*

# Origins of the San Joaquin Valley Health Fund

Since 1985, Sierra Health Foundation has invested in non-profit and public agencies in Northern California to improve community health and well-being. The Foundation's charter focuses its grant-making in 26 predominately rural counties in the northeastern part of California; however, in the wake of the 2008 financial crisis, Sierra Health Foundation and its Board of Directors recognized a growing need to support communities across California that had been hit hardest by the Great Recession, including those in the San Joaquin Valley.

## The San Joaquin Valley

The San Joaquin Valley is a culturally and ethnically diverse, rapidly growing, and largely under-resourced region in California. The Valley's nine counties—San Joaquin, Stanislaus, Mariposa, Merced, Madera, Fresno, Kings, Tulare, and Kern—cover approximately 28,000 square miles and include both small rural communities and major population centers such as Bakersfield, Fresno, and Stockton. The Valley is a vitally important agricultural area, growing food consumed across the United States and other countries.

Compared to the rest of the state, the Valley experienced some of the strongest economic impacts of the Great Recession, with unemployment reaching 17 percent in some urban areas, and home values dropping by over 30 percent.<sup>1</sup> While the recession undoubtedly took a toll on the Valley, many of its communities have long struggled with high rates of poverty and poor health. More than one in four of the region's children under the age of 18 live in households with incomes below the Federal Poverty Level. When the proportion of children under the age of six is examined by race, the disparity is stark: while approximately 20 percent of white children are poor, that percentage increases to 30 percent for Asian and multiracial children, 40 percent for Latino children, and 60 percent for African American children.<sup>2</sup> Many people rely on jobs in industries like agriculture and food processing, with

**Exhibit 1. Counties in California's San Joaquin Valley**



<sup>1</sup> Doyle, M. "Where's recession really bad? California's San Joaquin Valley." *Merced Sun Star*. June 16, 2009.

<sup>2</sup> Hartzog, C, Abrams, C, Erbstein, N, London, JK, and Watterson, S. *California's San Joaquin Valley: A region and its children under stress*. Report commissioned by Sierra Health Foundation and conducted by the UC Davis Center for Regional Change. 2016.



limited opportunities to find jobs that pay higher wages or provide more stable income. The impact of poverty is further compounded by histories of residential segregation by race and ethnicity, with poor—and often unincorporated—areas frequently faced with exposure to environmental hazards, lack of transportation, inadequate housing, poor air quality and limited basic services such as clean water, sewage treatment, and sidewalks.<sup>3</sup> These challenges have contributed to the region’s history of experiencing some of the worst health outcomes in the nation. In the Robert Wood Johnson Foundation’s 2018 County Health Rankings, five of the Valley’s nine counties ranked among the state’s least healthy counties.<sup>4</sup>

These inequities have been further compounded by patterns of underfunding from both government and private sources. Counties in the San Joaquin Valley have received insufficient public funding to address these considerable health and racial inequities. For example, the Central Valley Health Policy Institute found that “the San Joaquin Valley receives less public health funding from state and federal sources than other California counties with similar populations.”<sup>5</sup> The region’s nonprofits also have fewer resources. According to an analysis of data from the National Center for Charitable Statistics, nonprofits in the Valley are funded at only 50 percent of the national average.<sup>6</sup> Although many of the Valley’s counties fell outside of Sierra Health Foundation’s original focus regions, these factors encouraged the Foundation to consider strategies to address inequities in the San Joaquin Valley.

## **The Center at Sierra Health Foundation**

In 2012, Sierra Health Foundation established The Center for Health Program Management, now known as The Center at Sierra Health Foundation. The Center operates as an independent non-profit organization that leverages leadership, infrastructure, and funding from Sierra Health Foundation and other funders to achieve long-term impacts on health and well-being throughout California. Although operated as a non-profit, The Center is careful to ensure that it does not “compete” for grants available to other non-profit organizations in the San Joaquin Valley. Rather, The Center helps introduce funders to the region, and connect funders with local organizations that they are interested in funding directly.

Grants from additional funders and public agencies have enabled The Center to grow and manage several initiatives working to achieve health and racial equity across California. By opening offices in both Sacramento and Merced, The Center purposefully immersed itself in the particular context and environment of the San Joaquin Valley. The Center’s establishment therefore created a mechanism for Sierra Health Foundation to gain a deeper understanding of the inequities faced by San Joaquin Valley communities, and work closely in partnership with local communities to consider strategies to address them.

## **Shaping the San Joaquin Valley Health Fund**

To explore funding strategies for the San Joaquin Valley, key leadership at Sierra Health Foundation—including President and CEO Chet P. Hewitt, former Vice President of Programs and Partnerships Diane Littlefield, and Director of Health Programs Kaying Hang—began to meet with Valley residents and stakeholders in 2013 and 2014. Organized by local board members and staff from The Center, this

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<sup>3</sup> Hartzog 2016.

<sup>4</sup> University of Wisconsin Population Health Institute. County Health Rankings 2018.

<sup>5</sup> Central Valley Health Policy Institute, CSU Fresno. *Operational and statutory capacity of local health departments in the San Joaquin Valley*. 2013.

<sup>6</sup> Great Valley Center. *Assessing the Valley via indicators: The economy* (4<sup>th</sup> edition). 2014.

community listening tour spanned eight of the nine counties in the Valley,<sup>7</sup> and eventually expanded to include program officers from additional philanthropic partners.

The house parties, meetings, and road trips that were part of the listening tour served two purposes. First, they helped leadership at each foundation to get to know the region. Hearing directly from community members and seeing first-hand the challenges they faced strengthened Sierra Health Foundation’s motivations to invest in the region.

Second, they ensured that The Center’s approach to funding in the San Joaquin Valley reflected the community’s input. From the outset, both The Center and Sierra Health Foundation wanted to focus on strengthening the region’s ability to advocate for policy and systems change in order to achieve racial and health equity. The community listening tour confirmed that organizations in the San Joaquin Valley agreed with this approach. According to Hang, community members acknowledged the continued need for direct service funding, but also underscored their desire to address the underlying policies and systems that were creating the inequities to begin with.

In addition to reinforcing the planned focus on policy and systems change, community members and stakeholders provided input about how The Center and Sierra Health Foundation should approach their engagement with the San Joaquin Valley. In particular, they highlighted the following principles:

- **Listening with no set agenda.** The Center was encouraged to follow the community’s lead in defining the priorities for any funding strategy.
- **Maintaining a physical presence in the San Joaquin Valley.** Community members stressed the importance of hiring local staff who could take the pulse of local issues and policies.
- **Investing directly in San Joaquin Valley organizations.** Rather than investing in larger, more well-known organizations in other parts of the state, The Center was encouraged (to the extent possible) to invest directly in organizations who knew the region intimately.
- **Bringing others along.** Community members underscored that The Center and the Foundation would be most successful if it partnered with others—including funders, key influencers, and local organizations—to address the deep-rooted and complex needs of the region.

## Launching the San Joaquin Valley Health Fund

In 2014, Sierra Health Foundation established the San Joaquin Valley Health Fund, and was joined by other early investors such as The California Endowment. Managed by The Center at Sierra Health Foundation, the Fund’s goal was to strengthen the San Joaquin Valley’s capacity to advocate for changes that improved the health and well-being of all residents. With an initial pooled fund of \$1.1 million, the Fund set out to offer small grants to nonprofit organizations and public agencies in the Valley. Rather than funding direct services, these \$10,000 to \$20,000 “mini-grants” were to fund activities and staff time focused on advocacy, policy, and systems change to address systemic barriers to health and racial equity.

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<sup>7</sup> Kern County was added in 2016.

In its pilot year, The Center invited a small group of local organizations to respond to “special opportunity” grants, and three received funding. This intentional approach helped the Fund to establish relationships with key leaders in the region.

In 2014, the Fund expanded this grant opportunity in its first open Request for Proposals (RFP). Since this RFP, the San Joaquin Valley Health Fund has offered three additional rounds of small grants. As of 2018, the Fund has invested \$6 million in local organizations and grown to include 90 funded community partners. In 2017, the Fund also began piloting a second level of grant-making through a grant from the W.K. Kellogg Foundation. These “Healthy Communities Cluster Grants” provide up to \$600,000 over multiple years to groups of organizations that come together to work on a common policy target. Current cluster grants focus on issues such as ensuring educational equity for Southeast Asian students, protecting young children from exposure to pesticides, advocating for the rights of immigrants, and ensuring landlords are held accountable for providing habitable rental housing. These cluster grants are the next step in the Fund’s efforts to increase investment, collaboration, and concrete policy change through movement-building in the San Joaquin Valley.

At the same time that the network of community partners has grown, so too has the number of philanthropic partners. As of 2018, thirteen philanthropic partners have contributed to the San Joaquin Valley Health Fund (see Appendix for a list of current and past funders). These funders include foundations from across the country, and with varied focus areas (including health, education, civic engagement, immigration, and environmental justice). San Joaquin Valley Health Fund staff work closely with each funder partner to ensure that their contributions align with both the Fund’s focus on policy change to achieve health and racial equity, and with each foundation’s specific goals. This partnership with funders ensures that the Fund leverages each foundation’s expertise, and identifies opportunities for funders to increase their level of engagement or funding. See Exhibit 2 for a timeline of the San Joaquin Valley Health Fund’s key funding events.



**Exhibit 2. Key funding events that shaped the launch of the San Joaquin Valley Health Fund**

<b>2013</b>	Community listening tour
<b>2014</b>	3 invitation-only pilot grants awarded (\$139,000) 2 funder partners
<b>2015</b>	100 applicants to first open Request For Proposal (RFP) Mini-grants to 30 organizations (\$490,000) 3 funder partners
<b>2016</b>	75 applicants to 2 <sup>nd</sup> RFP Mini-grants to 58 organizations (\$1.03 million) 7 funder partners
<b>2017</b>	101 applicants to 3 <sup>rd</sup> RFP Mini-grants to 54 organizations (\$960,000) 4 multi-year cluster grants awarded (16 orgs, \$2.04 million) 9 funder partners
<b>2018</b>	85 applicants to 4 <sup>th</sup> RFP Mini-grants to 58 organizations (\$975,000) 18 funder partners

# Key elements of the San Joaquin Valley Health Fund

The four rounds of grants awarded to dozens of San Joaquin Valley organizations reflect key elements of the San Joaquin Valley Health Fund’s model: a) the goals the Fund hopes to accomplish, b) the strategies pursued to achieve those goals, and c) the partners engaged in the Fund’s work.

## What the Fund hopes to accomplish

The core vision of the San Joaquin Valley Health Fund is to achieve a healthier and more equitable San Joaquin Valley. To reach this goal, the Fund’s leaders and partners believe it is not sufficient to mitigate the impacts of the social and economic challenges that people face. More fundamentally, it requires changing the attitudes, policies, and systems—and addressing the interconnected root causes — that have led to these inequities. To this end, the San Joaquin Valley Health Fund has focused its investments on building community capacity to advocate for programs and policies that promote community health and health equity for all.

## How the Fund does its work

With the goal of a healthier and more equitable region at its center, the Fund has developed six connected strategies that it employs in partnership with community partners and in consultation with funder partners: policy and systems change, community organizing and leadership development, strengthened organizations and expanded networks, political capital and leadership, education and knowledge, and effective communication strategies (see Exhibit 3). Each of the Fund’s strategies are detailed below.

### Policy and systems change

The Fund is based on the underlying principle that advancing health and racial equity requires changing the systems that reinforce inequities in opportunity and well-being. With its focus on policy and systems change, the Fund only supports direct services when they are part of a larger advocacy strategy. In addition to investing in community partners’ capacity to participate in their own advocacy activities, the Fund also facilitates several region-wide policy activities, including:

**Exhibit 3. The San Joaquin Valley Health Fund’s key strategies**





- **Development of a collective policy agenda.** To unify community partners’ voices around a clear set of policy priorities, the San Joaquin Valley Health Fund and its partners have developed a shared policy platform. The first iteration of the San Joaquin Valley Health Fund’s policy platform was developed by the policy committee in 2017 and included 14 priority areas that spanned a range of topics such as health coverage, transportation justice, pesticide exposure, and intimate partner violence. In 2018, these priorities were streamlined into [five focus areas](#)— health, education, environment, land use planning, and immigration (see Exhibit 4).<sup>8</sup> Partners worked together to identify the policies and systems changes they would pursue in order to achieve equity in each area. This shared policy platform explicitly acknowledges how these issues connect, and how often they impact the same groups of marginalized communities in the region. Furthermore, the joint development of the 2018 policy platform by community members and local elected officials underscores the importance of partnership between all key stakeholders in the region.
- **Annual Equity on the Mall event.** One of the major ways that the Fund and its partners communicate their collective policy agenda is through *Equity on the Mall*, an annual rally at California’s state capitol in Sacramento. Started in 2016 as a modest policy briefing, *Equity on the Mall* is now an annual event that brings residents from across the San Joaquin Valley to California’s capitol to share their stories, hear from elected officials, and hold these elected officials accountable for addressing the needs of the region. In 2018, more than 1,500 community leaders, families, young adults, and community organizers participated in *Equity on the Mall*. Community partners presented the 2018 San Joaquin Valley Health Fund policy platform and held a forum for Valley residents to discuss how gubernatorial candidates planned to address key issues for the Valley such as water access, air quality, and poverty. Furthermore, several of California’s legislative leaders welcomed the opportunity to address the crowd about the partners’ issues and priorities.
- **Facilitation of monthly policy committee meetings.** Each month, more than 50 representatives from funded partner organizations meet via video conference to discuss key policy issues in their communities and strategies for aligning and advancing their efforts. These policy committee meetings are instrumental in developing the collective policy agenda for the region.

#### **Exhibit 4. 2018 San Joaquin Valley Health Fund Policy Platform**

##### **Health**

Equitable access to health care and health care coverage for San Joaquin Valley residents

##### **Education**

Education systems—from early childhood to adult training—that are high quality, trauma-informed, and support healthy youth development

##### **Environment**

Policies that ensure access to safe and affordable drinking water, reduce greenhouse gas emissions and co-pollutants, and promote child-safe farming practices

##### **Land use planning**

Communities supported by smart growth planning that includes affordable housing, transportation, green space, and addresses homelessness, displacement, segregation, and gentrification

##### **Immigration**

Policies that create pathways to citizenship and help keep families intact, including protections and supports for DACA recipients, their families, and immigrants facing deportation

<sup>8</sup> The San Joaquin Valley Health Fund policy platform is updated annually. See the [SJVHF website](#).

## **Community organizing and leadership development**

Health and racial equity can best be advanced through the voices, participation, and leadership of the community residents who experience the greatest disparities in access to resources and opportunities. In a region with a history of excluding people of color from access to equitable opportunity, building the power of local leaders and other residents to participate in policy and systems decision-making processes is essential for achieving change. At a gathering of local elected officials, leaders of community-based organizations, and Valley residents, Sierra Health Foundation President and CEO Chet P. Hewitt underscored the Fund's commitment, stating that "as a foundation with our foundation colleagues, we decided that we would really focus on community and try to facilitate their campaign for change."

To do this, the Fund prioritizes funding organizations that are working to increase civic engagement and train the next group of community leaders. As emphasized by Susana DeAnda, co-Founder and co-Executive Director of funded partner Community Water Center, "if we really want to...create social change, it's important that impacted residents are at the forefront, are at the decision-making level, and are at the table recommending solutions for their community."<sup>9</sup>

## **Political capital and leadership**

Political capital is the ability to use one's influence and power to bring about policy change. When local organizations and leaders use their grants to organize community residents, they are building political capital that is helpful in their local work as well as in regional advocacy. Grants that support the development of local political capacity can also lead to relationships with future political leaders. One of the Fund's first grants went to the Reinvent South Stockton Coalition, establishing a relationship with then-city councilmember Michael D. Tubbs, who is now Stockton's mayor. Mayor Tubbs has since taken a lead role in organizing other elected officials representing the region. In this role, Mayor Tubbs worked with Chet P. Hewitt, President and CEO of The Center at Sierra Health Foundation, to convene the San Joaquin Valley Leadership Executive Committee, which raises awareness of the Valley's assets and advocates for increased investment in the Valley and its residents. The Leadership Executive Committee collaborated with the Fund's Policy Committee on developing the 2018 Policy Platform.

As the Fund's manager, The Center also leverages its own political capital to amplify community partners' advocacy efforts for health and racial equity both locally and in Sacramento. Jahmal Miller, former Deputy Director of California's Office of Health Equity, stated that The Center's position allows it to be a "credible, powerful voice with influence in a political arena with capital to invest." One funded partner reiterated this point, saying that "it's really valuable and important to us to have relationships with [locally based] funders because they serve as respected people in the community that can talk to other leaders about the importance of social justice."

## **Education and knowledge**

The Fund's community-first approach emphasizes the importance of learning directly from the organizations and residents working and living in the Valley. As described earlier, Sierra Health Foundation started with listening sessions to learn about the priorities of community leaders and the approach of organizations looking to invest in the region. This process educated the Fund and its investors about the community's needs. Jahmal Miller, the former Deputy Director of the

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**—Chet P. Hewitt,  
President and CEO, Sierra  
Health Foundation and  
The Center at Sierra  
Health Foundation**

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<sup>9</sup> Hartzog 2017.

Office of Health Equity, noted the value of this approach for long-term change in community health. He remarked on the particular ability of the San Joaquin Valley Health Fund to keep engaging community residents and partners even beyond the initial listening tour. “[For a] fund that was envisioned from a top-down perspective, it really listened first to communities,” Miller commented. “There is a lot of proactive effort to engage with the community. Communities really helped design what the programmatic focus would be.”

The Fund is committed to continuously learning about the needs and priorities in the region. One way in which the Fund builds on its understanding of the region is by analyzing applications from community-based organizations. In each funding cycle, applicants are asked to identify their own focus areas rather than responding to pre-determined priority topics. Analyzing these applications is one important way the Fund regularly adds to its knowledge of local priorities, needs and opportunities.

In addition to learning from the community, the Fund has commissioned research to educate others about the inequities and assets of the Valley. The research has been used to inform The Center’s efforts around planning, fundraising, and advocacy. The first of three reports prepared by the UC Davis Center for Regional Change highlighted specific communities that had the greatest opportunity for change.<sup>10</sup> Two recent reports described the racial and health inequities experienced by children across the Valley<sup>11</sup> and inequities and related advocacy efforts in Kern County.<sup>12</sup> The Fund takes steps to include community partners in the development of this research, with partners and residents providing critical feedback on the 2016 report’s preliminary findings through town hall meetings, and serving as the source for case studies on effective advocacy efforts.

The combination of local expertise and empirical data in these reports has made them important tools for San Joaquin Valley stakeholders. They have been used by community partners to advocate for policy change, by state and local officials to inform policy, and by The Center to make the case for investing in the Valley. For example, staff and funder partners have made presentations to philanthropic affinity groups, such as Northern California Grantmakers, about the Fund and the region. Data on the Valley’s conditions have also been included in media reports, as well as public briefings at the State Capitol. These learnings about the San Joaquin Valley’s needs and opportunities have clarified why funders and community partners should invest in the region. According to one funder, these reports have helped to “frame the whole project” of the San Joaquin Valley Health Fund.

### **Effective communication strategies**

Communication is at the core of building successful, trusting relationships with community partners. The Fund uses common communication approaches such as site visits, webinars, social media and a weekly e-blast to share events, advocacy, funding and learning opportunities, and other resources with community partners, as well as more intensive methods such as in-person convenings for community and funder partners to share learnings and support networking. Hiring local staff has also been essential to communicating effectively with community partners.

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<sup>10</sup> London, JK and Watterson, S. *Mapping Opportunity in California’s San Joaquin Valley*. Report commissioned by Sierra Health Foundation and conducted by the UC Davis Center for Regional Change. 2015.

<sup>11</sup> Hartzog 2016.

<sup>12</sup> Hartzog, C, Abrams, C, Erbstein, N, London, JK, and Watterson, S. *Kern County: Geography of Inequity and Opportunities for Action*. Report commissioned by the San Joaquin Valley Health Fund, funded by The California Endowment and conducted by the UC Davis Center for Regional Change. 2017.

In addition to developing effective communication with funded partners, the Fund seeks to amplify the voices of residents so that state and regional stakeholders hear directly from them. In particular, the Fund focuses on bringing attention to the experiences of residents who encounter the greatest inequities, alongside the organizations that are advocating with and for them. This strategy can be seen throughout the Fund’s work, including the role that community partners play in sharing their own stories in public settings such as *Equity on the Mall*, the integration of their perspectives into commissioned research, and seeking ongoing feedback and input from community partners about their experiences with the Fund itself.

### **Strengthening organizations and networks**

Community partners that receive grants from the Fund use this funding to advance their policy and systems change work. At the same time, the Fund uses the grants as an avenue to increase investments in the region, provide capacity-building activities to partners, and grow the network of advocates working for health and racial equity in the region.

#### ***Increasing investments***

From the start, the Fund has been intentional in including small, local organizations as funded community partners. These groups may not have previously focused on policy or systems change or attracted much philanthropic attention, but they represent—and work closely with—the most vulnerable residents of the Valley. Diane Littlefield, former Vice President of Programs and Partnerships at Sierra Health Foundation, said, “We made it clear who was sitting at the table first...it was very intentional [because we heard] from the community partners that that was important to them.”

While the Fund’s resources are dependent on the contributions of philanthropic partners, most funded community partners have received multiple years of funding in order to deepen their work and strengthen their connections to the Fund’s other partners. Community partners have also been able to build their relationships with other statewide and national funders who invest in the Fund, thereby supporting their fund development efforts.

The Healthy Communities Cluster Grants introduced in 2017 added a new opportunity for the Fund to invest in the region, as well as a new way for community partners to increase their policy activities. Cluster grants offer a much higher level of funding, with the understanding that clusters include experienced advocacy organizations with a regional footprint as well as smaller local organizations with strong connections to impacted communities. The diversity of funded organizations within each cluster creates a strong foundation for building capacity, strengthening networks, and advancing significant policy change.

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**–Diane Littlefield, former Vice President of Programs and Partnerships, Sierra Health Foundation**

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### **Building capacity**

The San Joaquin Valley Health Fund offers supports and technical assistance for community partners to increase their ability to organize and advocate. These supports include:

- **In-person and virtual learning opportunities.** The Fund organizes events and trainings that foster learning, conversation, and action among community partners. Funded community partners agree to participate in at least three convenings during a grant period, including *Equity on the Mall* and an annual launch event that introduces new funded partners to previous cohorts. These convenings are used to share experiences and information, including policy change opportunities and strategic networking. In 2017, for example, the Fund organized the first San Joaquin Valley Leadership Conference, where partners heard from elected officials, learned more about health and racial equity, and discussed a unified policy platform for the San Joaquin Valley. The Fund also organizes in-person and online trainings to build specific skill sets needed to effect policy change. Recent training topics have focused on guidance on nonprofit lobbying rules, opportunities for community canvassing to support Census 2020, and ways to support increased access to safe drinking water.
- **Site visits.** The Fund's staff conduct site visits with community partners. With offices in both Sacramento and Merced, staff are able to establish in-person connections and build relationships with community partners. According to Program Officer Socorro Santillan, these site visits present community partners with an opportunity to share their successes and talk openly about their challenges. For the Fund, they are an important way to be sure that each partner has what it needs to thrive.
- **Technical assistance as needed.** Outside of these more formal channels for training and technical assistance, San Joaquin Valley Health Fund staff provide ad hoc support to community partners to address emerging questions, concerns, and feedback. This technical assistance includes topics such as fund development, partnership development, and policy advocacy.

The Fund's efforts to build capacity among smaller organizations also ensure that the network continues to bring in new partners. As Braff-Guajardo observed, "I looked across the room [at a recent meeting and] I knew about 50 percent of the organizations. There were a whole bunch of new players engaged...[the Fund] is helping to build this army for real change in the Valley, to ensure that vulnerable communities [get] their fair share of attention or resources."

### **Growing networks**

The grants and convenings are a stepping stone to developing new connections. Jesus Martinez, the Executive Director of the Central Valley Immigrant Integration Collaborative, a current community partner, expressed that the Fund's convenings have been critical for participating organizations to expand their understanding of communities across the region. According to Martinez, "the value goes beyond the financial support. An even greater value has been the connection to all the other organizations [and] the ability to learn from them. The organizations that we've been connected to via this Fund, they know the local communities; they know what is significant to them. We learn from the work that they do in all those different areas. You really can't put a price on that."

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**–Jesus Martinez, Chair, Central Valley Immigrant Integration Collaborative**

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## Integrating the Fund's strategies

The San Joaquin Valley Health Fund's strategies are intertwined. The policy platform, for example, was the result of community leadership, networking, and political leveraging. *Equity on the Mall* is one of the Fund's most effective communication strategies, which also leverages stakeholders' political capital and unites community residents to advocate for regional policy and systems changes prioritized by impacted communities. Furthermore, these strategies—along with specific policy activities—will continue to evolve with the work of the Fund and its partners.

## Who participates in the Fund

Three key groups of partners participate in the San Joaquin Valley Health Fund:

- **Funders** from across California and the United States make grants to the San Joaquin Valley Health Fund. This pooled fund is managed by The Center at Sierra Health Foundation, an independent non-profit organization affiliated with Sierra Health Foundation.
- **The Center** manages the Fund. This role includes administering grant-making, implementing the Fund's organizing and capacity-building activities, seeking additional funder partners, and reporting back to these funders.
- **Community partners** receive grants from the San Joaquin Valley Health Fund that allow them to pursue their organization's own policy efforts, and participate in the Fund's region-wide policy and learning activities. Furthermore, they offer insights and feedback that shape the Fund's direction and focus.

Each group contributes to the success of the Fund, and each is positioned to learn and benefit from their participation. Funders, for example, are contributing to an initiative that aligns with their own foundation's funding strategies and goals. In return, they improve their capacity to make additional grants in the region by learning more about the San Joaquin Valley and its organizations. The Fund's investments help community partners to further their organization's policy activities. At the same time, they provide critical insights about the region's key issues and opportunities, which strengthen the work of the Fund (see the following section on early accomplishments for more information on how the Fund has benefited each of these groups of partners).

The staff of the San Joaquin Valley Health Fund play an indispensable role in connecting community partners to each other and to the funders. Ellen Braff-Guajardo, a former Program Officer at the W.K. Kellogg Foundation and current Senior Program Officer for the San Joaquin Valley Health Fund, emphasized the importance of local staff to the success of the Fund. She stated that "local staff can serve as a bridge between organizations who may not have worked together or known each other in the past. [They] can also be a welcoming bridge between new funders and the organizations."

In addition to helping funders and community partners communicate and collaborate with each other, The Fund's staff work to align partners' goals and objectives. They coordinate with funder partners to ensure that contributions are used for policy and systems change work that advance the health and well-being of Valley residents, and also meet the goals of the contributing foundation. For example, the Blue Shield Foundation of California focuses on reducing domestic


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**"Local staff can serve as a bridge between organizations who may not have worked together or known each other in the past. They can also be a welcoming bridge between new funders and the organizations."**

**–Ellen Braff-Guajardo,  
Senior Program Officer,  
Sierra Health Foundation**

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violence, and wanted its contributions to the San Joaquin Valley Health Fund to help them make progress towards this goal. Working together, the Fund and the Blue Shield Foundation of California provided funding to organizations using community organizing, leadership development, and policy change to prevent domestic violence. This approach helped to support vital community-driven initiatives while meeting both organizations' funding priorities.

Finally, The Center ensures that community partners are supported in their work, and that the Fund continues to evolve to meet their needs. Nora Dunlap, Senior Program Associate for the San Joaquin Valley Health Fund, spoke to The Center's receptiveness to partner feedback. "The feedback has been sincere and honest," she shared. "Even when things aren't perfect or they have critiques, [funded community partners] don't hesitate to tell us. I think they realize we're not going to hold it against them. We take that [feedback] genuinely, and incorporate it going forward." Socorro Santillan, a former funded partner and current Program Officer for the San Joaquin Valley Health Fund, also highlighted the role that partners and staff play in co-evolving the Fund's approach. "Nothing was set in stone...so there was definitely flexibility and room for change. To be able to have that attitude—'well, we tried the first time, we go back to the drawing board, and we all try something new'—I think that's where the model has been successful." 

# Early accomplishments

The San Joaquin Valley Health Fund's first four years point to its potential as a model for achieving health and racial equity in under-resourced regions like the San Joaquin Valley. This section highlights key aspects of the Fund's implementation that have contributed to the model's strength, as well as accomplishments that have emerged as a result.

## The Fund has established strong relationships in the San Joaquin Valley through its approach to community engagement and partnership

The San Joaquin Valley Health Fund recognizes that strong community relationships play an integral role in the success of its work. To this end, the Fund has taken intentional steps to establish these relationships from the outset.

In addition to the community listening tour and pilot grants discussed earlier, The Center has hired local staff who are familiar with the San Joaquin Valley. Hiring local staff has strengthened the credibility of the Fund with community partners. Several partners noted the benefits of interacting with staff who "come from similar backgrounds of the population we serve," and who either live in or are from the San Joaquin Valley.

Furthermore, community partners value the staff's efforts to learn more about their work and their communities. Partners noted that the Fund's staff "are always eager to hear about what our organization is doing outside of the activities they fund," "made efforts to better understand the complexity of the work we do," and "are always thoughtful and generous with their time and resources." These sentiments were reflected in a survey of funded community partners, where 84 percent felt that staff understood the goals and strategies of their organization's work, and 87 percent felt they understood the communities their organizations worked with (Exhibit 5).

### Exhibit 5. The Fund's staff work to understand the goals and needs of community partners

Percent of partners who agree or strongly agree with the following statements:



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**"SJVHF staff have made efforts to better understand the complexity of the work we do."**

**-Funded Community Partner**

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## The Fund has brought attention to the San Joaquin Valley

Because it focuses specifically on the San Joaquin Valley, the Fund has brought renewed attention to the inequities experienced by communities in this part of the state. Fatima Angeles, Vice President of Programs at The California Wellness Foundation, noted that this increased attention has the potential to bring additional resources to the region. According to Angeles, “the San Joaquin Valley Health Fund really highlights the needs of the region, which is important for other investors—not just for funders, but for local government, for policy makers, [and] for corporations.” Community partners also appreciated the Fund’s leadership in this role; one community partner expressed her gratitude, saying “We are blessed that The Center exists. The story that The Center tells is rarely articulated by local elected officials and other prominent local people. The Center is a game-changer for the better. It is aggregating resources for policy [and] social justice work and building a healthy Valley.”

While increased attention has been critical, so too have the ways the Fund has changed the narrative about the region. This has included:

- **Emphasizing the strengths of communities in the Valley.** The Fund brings a strengths-based approach to its funding strategy. This means focusing on the region’s existing work and assets for improving health and well-being, while continuing to expand the community’s power and potential. As Allison Domicone of the Hellman Foundation shared, “the narrative about the work they’re doing is coming from a place of optimism and positivity, and thinking about the assets that exist as opposed to just the dire straits that people are in...I think it’s so important and refreshing to change the narrative [in this way].” Sarah Reyes, Director of Communications for The California Endowment’s Building Healthy Communities work in the Central Valley, put this another way: this approach “honors the work that has been done, and honors the way that people work together in the Central Valley.”
- **Focusing on the connections between issues in the region.** Similar to many place-based initiatives, the San Joaquin Valley Health Fund looks not at a single issue, but at the broad landscape of the region’s opportunities and challenges. Sasha Khokha, a San Joaquin Valley Health Fund collaborator and Central Valley Bureau Chief for KQED’s California Report, commented on the San Joaquin Valley Health Fund’s success in making these connections. According to Khokha, the Fund is “looking at issues and disparities in the San Joaquin Valley in a really comprehensive way [to] form a complete picture of what is influencing public health outcomes in the Valley, and how all of these issues—air pollution, water quality, lack of sidewalks, inability to get fresh food—are linked together.”
- **Amplifying community voices.** By bringing people from across the region together, the San Joaquin Valley Health Fund has helped to unite the voices of organizations tackling similar issues. Daniel Jimenez, Organizing Coordinator for the Community Water Center, a funded partner of the Fund, shared that “The Fund has done an amazing job bringing organizations and communities together to tackle these issues...and to make our voices louder in the Valley.” Simultaneously, this focus has elevated individual stories about the inequities that communities face. As Sasha Khokha from KQED stated, the Fund has leveraged its “deep connections with different communities and organizations” so that people across the state “can hear real people in real communities affected by real issues tell their own stories.”

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**“We are blessed that The Center exists. The story that The Center tells is rarely articulated by local elected officials and other prominent local people. The Center is a game-changer for the better. It is aggregating resources for policy and social justice work and building a healthy Valley.”**

**–Funded Community Partner**

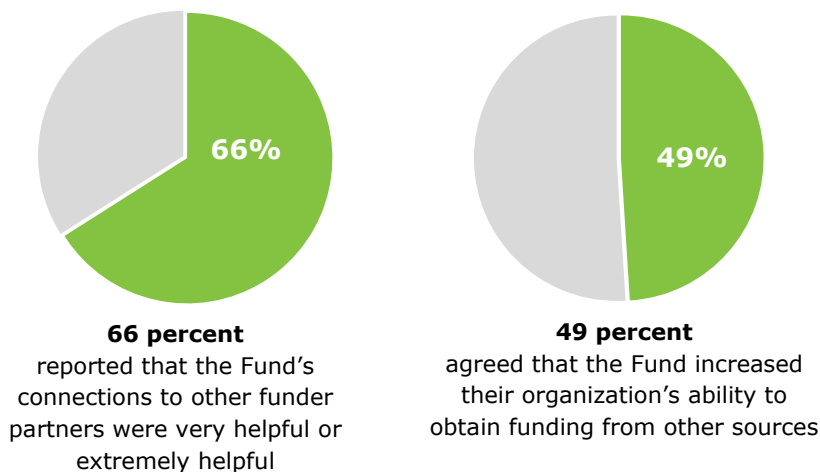
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## The Fund draws critical resources to the San Joaquin Valley

The Fund’s mini-grants and cluster grants have brought immediate financial resources to the San Joaquin Valley that are valued by community partners. As one community partner remarked, “We absolutely could not have done this policy work without [the Fund’s Round 2] funding. We’ve made tremendous progress in San Joaquin County through this funding.” While some community partners indicated that the mini-grants should be increased in size or length (a sentiment echoed by some funders and external stakeholders), the majority who received grants (63 percent) reported that they received sufficient funding for their participation. One partner remarked that “although the grant size is small, the [Fund’s] staff enhance opportunities for the organizations to increase skills, network with others, and also [offer a] platform to advocate on a large scale.”

Beyond the Fund’s direct grant-making activities, community partners reported that the Fund increased their ability to obtain grants from other sources. Two-thirds of community partners found that the Fund’s ability to connect them with other funders had been very or extremely helpful, and 49 percent reported an increased ability to obtain funding from other sources (Exhibit 6).

### Exhibit 6. The Fund brings more funding resources to the region



## The Fund’s infrastructure facilitates investment in the San Joaquin Valley

The structure of the San Joaquin Valley Health Fund supports funders to make informed investments in the region that align with their philanthropic organization’s own goals. According to the San Joaquin Valley Health Fund’s current funder partners, the Fund facilitates these investments by:

- **Providing an introduction to the region.** Several funder partners noted that previous interest in investing in the San Joaquin Valley had been constrained by their narrow knowledge of the region, and their limited capacity to increase that knowledge. The mechanisms of the Fund—including the pooled funding structure, management by a trusted philanthropic partner, and local staff—give funders an introduction to the region. This was particularly important for national funders, as well as those without prior experience funding organizations in the Valley. Melina Sanchez, a Program Officer at the James Irvine Foundation, stated that the pooled fund “makes it easy for investors who aren’t based in the Central



Valley to still allocate resources while feeling that the work will be community-driven. The model of the pooled fund allows for a [national or statewide funder] to say 'We want to be partners, but we know you know your community.' "

- **Increasing opportunities to make additional investments in the region.** Half of the funder partners interviewed shared that they were able to identify opportunities to invest directly in the San Joaquin Valley as a result of their partnership with the Fund. Fatima Angeles shared that The California Wellness Foundation's partnership with the Fund "allows us to learn more about what's happening in the area...We are a more informed funder, and because we are more informed, we are investing more in the region." Craig Martinez, Program Manager at The California Endowment, elaborated on ways that his foundation has learned about new partners from the Fund. According to Martinez, they have been able to turn to the list of the Fund's partners in order "to identify partners who may not have been part of our constellation before," but are pursuing work that aligns with their goals. This has allowed them not only to "provide small funding, but be able to stimulate inventive [and] innovative work, and be able to develop new partnerships."
- **Strengthening relationships with other funders.** In addition to expanding their networks with community partners, funders also saw value in connecting with the Fund's other state and national funder partners. "The Fund has definitely added value because it has leveraged our money and extended our reach," said Pablo Bravo, Dignity Health's Vice President of Community Health. "It has added value because we have new [foundation] partners that we now work with."
- **Increasing the impact of investments.** Funders appreciated that the investments they made in the San Joaquin Valley Health Fund supported their own organizations' funding priorities. Some funders applauded the staff's efforts to find the right fit between the Fund's focus on policy and systems change, the funders' own priorities, and community organizations in the region. Fatima Angeles at The California Wellness Foundation said "We want organizations working on the issues we care about to get the resources they need, and I think [the San Joaquin Valley Health Fund] did a really great job of aligning our priorities with the needs of the region." Importantly, funders felt that the San Joaquin Valley Health Fund not only aligned with their organizations' goals, but that it could help to amplify the impact of their contributions. As Ellen Braff-Guajardo shared, "one of the really beautiful possibilities for the San Joaquin Valley Health Fund is that [as a funder, you can] get the bang for the buck in terms of whatever the amount of your contribution. I believe it's a much more attractive opportunity to a funder, especially a smaller funder."

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**"We are a more informed funder, and because we are more informed, we are investing more in the region."**

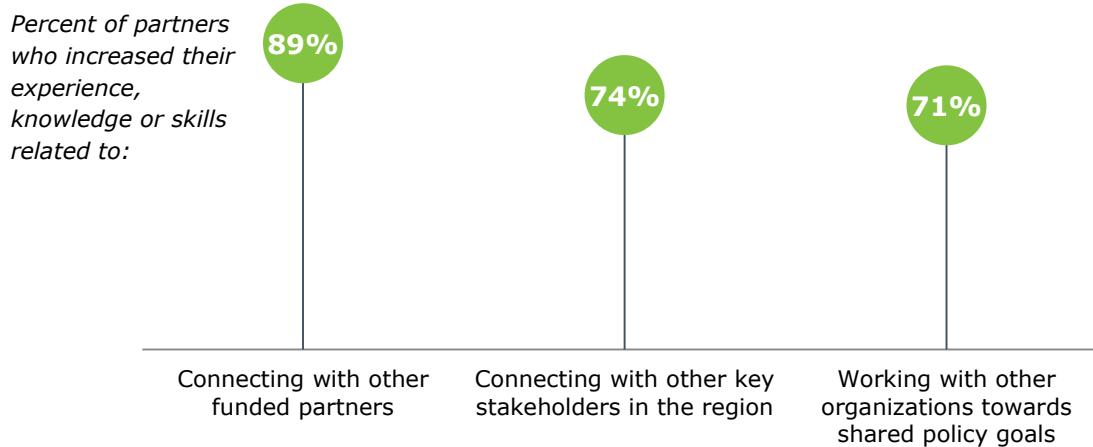
**–Fatima Angeles, Vice President of Programs, The California Wellness Foundation**

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## **The network of community partners has grown and strengthened its ability to mobilize**

One of the San Joaquin Valley Health Fund's key focus areas—and most notable early accomplishments—has been to increase the size and strength of the network of organizations mobilizing to achieve health and racial equity in the Valley. The Fund facilitates several different activities for community partners funded, including regular partner convenings, leadership conferences, and a policy committee that has worked to identify a regional policy platform. Community partners report that these opportunities have increased their connections with partners, including both funded organizations and other key stakeholders in the region (Exhibit 7).

**Exhibit 7. The Fund supported partners' ability to build connections with other partners in the region**



The improved network in the San Joaquin Valley has already resulted in some early successes for community partners. As previously discussed, bringing the wide array of partners together on a regular basis has increased visibility for the communities in the San Joaquin Valley and the challenges they face. The identification of a shared policy platform has further amplified the voices of community partners who are all speaking to a common agenda for the region.

This network has also bolstered the ability of organizations to respond quickly to the political climate in California and the United States following the 2016 president election. Carolyn Wang Kong, Senior Program Officer at the Blue Shield Foundation of California, said that “2017 was a real test for lots of these organizations. They had to come together very quickly post-election and mobilize because they were directly threatened either in terms of the communities they served or the topic areas that they worked on. I have seen [that] lots of these organizations were able to come together very quickly.” While this cannot be attributed entirely to the Fund, its presence and networking efforts likely contributed to the ability of community partners to coordinate quickly.

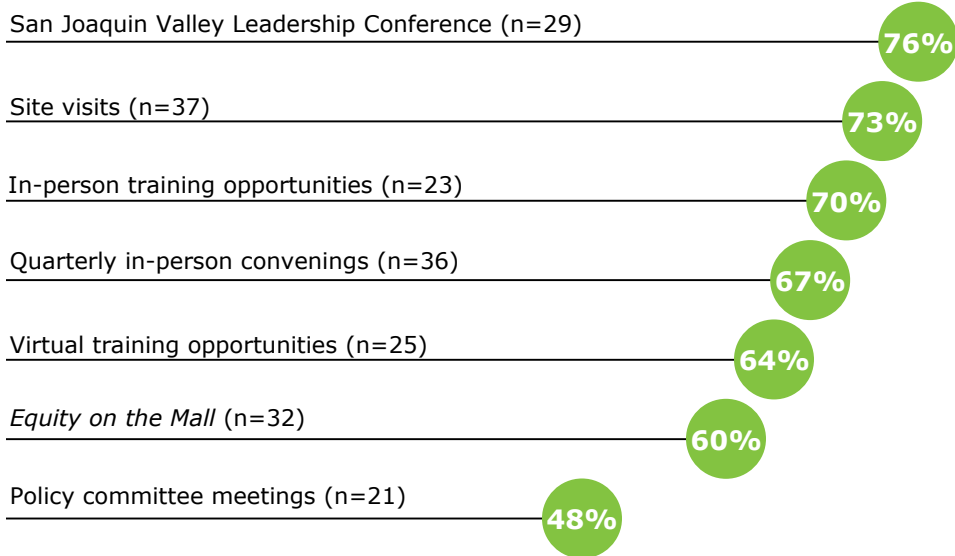
In addition to helping organizations achieve their immediate objectives, funders highlighted the importance of these connections for pursuing future funding. As more funders emphasize collaboration in their funding strategies—including those like the San Joaquin Valley Health Fund’s own cluster grants—it becomes increasingly important for organizations to demonstrate their ability to collaborate with each other. Ron Milam, Smart Growth California’s Interim Director and collaborator with the Fund, referred to the Fund’s cluster grants and networking opportunities as “good building blocks to create more collaborative spaces” among these organizations.

**The Fund supports community partners’ capacity to advocate for systems change**

In addition to bringing partners together, the San Joaquin Valley Health Fund has offered supports to increase partners’ ability to advocate for policy and systems change. These supports include site visits, training opportunities, and in-person convenings. Because these activities respond to needs identified by community partners, the majority reported that they were very helpful or extremely helpful in strengthening their approach to policy and systems change work (Exhibit 8).

**Exhibit 8. Supports offered by the San Joaquin valley Health Fund helped partners to strengthen their work\***

*Percent of partners who found supports very or extremely helpful:*



*\*N's indicate the total number of survey respondents who participated in the activity and rated its helpfulness.*

While participation varied among survey respondents—as did their rating of how helpful these activities were—the majority reported increased skills, knowledge, and experience for advocacy and policy change initiatives. Overall, 87 percent of partners agreed that the Fund accelerated their organizations’ ability to achieve systems and policy change. In particular, partners increased their experience, knowledge, or skills related to advancing health and racial equity (63 percent), advocacy for policy change (57 percent), and engaging community residents in advocacy efforts (55 percent) (Exhibit 9).

**Exhibit 9. Partners increased skills and knowledge for advocacy**



**87 percent of partners agreed that the San Joaquin Valley Health Fund accelerated their organization’s ability to achieve systems and policy change.**

Furthermore, community partners pointed to a change in their own understanding of their role in advocacy. According to the funded partner survey, 63 percent increased their understanding of their role in advancing health and racial equity. Combined with concrete advocacy skills, this paradigm shift is instrumental for successfully pursuing policy and systems change. As Jahmal Miller at the California Department of Public Health said, this approach “build[s] true capacity to address deeply rooted issues, so that as funding may subside over time, the programs, people and substance of what it was all about will last and transcend those resources.”

### **The Fund has established a collective agenda for change**

The San Joaquin Valley Health Fund and its partners have not just brought attention, investments, and capacity-building resources to the Valley; together, they have seeded a movement for change. Funders and community partners pointed to both the 2018 policy platform and *Equity on the Mall* as two early successes that will propel the Fund’s work forward. This policy platform is strategically important for the Fund because it clarifies the Fund’s approach to improving health and racial equity, and encourages community partners from a cross-section of issues to work together towards common goals.

*Equity on the Mall* in particular is seen as reinforcing the policy platform’s unified voice. According to Jonathan Nelson, Policy Director for the Community Water Center, “*Equity on the Mall* is useful for all the various organizations that work in the Valley as a demonstration of the breadth of the organizations, but also just the people power.” Craig Martinez of The California Endowment underscored this message: “*Equity on the Mall* is one of those places where [the Fund has] been particularly successful. To really see partners who represent a diversity of issues come together with a shared priority, being able to share a perspective, and really focus on the needs of an under-invested region—I think it’s really phenomenal.” 🌱

# Future opportunities

As the San Joaquin Valley Health Fund begins its fourth year of funding, The Center has much to celebrate. Community partners, funders, and key influencers who contributed to this report agreed that the Fund's innovative approach has contributed to the strength and size of the movement to achieve health and racial equity in the San Joaquin Valley.

Along with these successes, the Fund has also worked to identify and address challenges to implementing this model. This section describes key lessons learned by the Fund during its initial years, as well as opportunities for the Fund to continue acting on these lessons in the future.

## Telling the Fund's story

The Center and the San Joaquin Valley Health Fund's staff have played an important role in bringing attention to the San Joaquin Valley's needs and the partners working together to meet those needs. While this narrative has gained traction, telling the Fund's own story has been more difficult. Staff and partners identified two key challenges to explaining the Fund's strategies and goals: communicating with diverse stakeholders, and sharing the Fund's success.

### Communicating with diverse stakeholders

The Fund's structure requires that staff share its story with a wide range of stakeholders, including funded organizations, the broader network of partners in the San Joaquin Valley, current and potential funders, and the general public. Each of these stakeholders comes to the table with differing levels of interest, engagement, and understanding of the Fund's goals.

As the model has evolved, the Fund's ability to describe its work has improved. For example, staff have refined the RFP process so that potential funded partners have a clearer understanding of the Fund's focus on policy and systems change. This report, along with other internal efforts, have also helped the Fund to clarify the model's story. Continuing to tell the story in a way that resonates with each of these stakeholders is critical to the Fund's success. Two opportunities for strengthening strategic communication include:

- **Identifying the right amount (and channels) of communication for each audience.** Interest in ongoing updates and communication vary by partner. While some are looking for more frequent communication with the Fund's staff, others may only want quarterly updates about the Fund's progress (or, in the case of funder partners, the progress of their particular investments). Partners also have preferences about *how* they hear from the Fund. For example, some funder partners found tremendous value in attending in-person convenings to learn about the Fund's impact; others preferred the Fund's email digests for getting a concrete sense of the day-to-day work in the San Joaquin Valley. Some external stakeholders and funders also expressed interest in a stronger website that included resources, event calendars, email digest archives, and information about partners and staff with whom they have established important partnerships. Finding out which modes of communication work best for different partners will help the Fund's efforts to respond to their preferences, and to engage them effectively.



- **Sharing what’s important for each audience.** Funders, community partners, and elected officials all place value in different aspects of the Fund’s approach and its impact. For example, some funders who contributed to this report wanted to hear more about the strategic vision for the Fund; others were more interested in learning about the Fund’s impact on community residents. Similarly, the language and talking points for one audience might not make sense—or matter—to another. Community partners and other key influencers suggested developing materials in partnership with the Fund so that key language and images resonated with them and with the communities they serve.

### **Measuring the Fund’s success**

Another challenge that the Fund has faced is describing the progress it has made to date with its approach to achieving health and racial equity. Because the Fund did not set out with predetermined outcomes in its first year, these are only now beginning to crystallize. And, just like any other initiative focused on policy and systems change, it may take years for the Fund to achieve its goals, and even longer to see measurable outcomes. Although particularly challenging for a policy and systems change initiative, tracking and measuring progress are often vital ways to sustain momentum and keep partners engaged in the advocacy process.

Therefore, the Fund is actively exploring how it can track, measure, and share its progress with partners and key stakeholders. For example, they have begun to integrate elements of evaluation into their work as the Fund’s specific goals have become clearer. With technical assistance provided by the Fund, cluster grant recipients are currently implementing participatory evaluation projects that will equip cluster partners with information that will advance their own work while also informing The Center’s understanding of the effectiveness of the cluster approach. Sierra Health Foundation is also exploring indicators of short- and mid-term outcomes that summarize efforts in both The Center and the Foundation’s initiatives. The Fund’s focus on building grassroots capacity lends itself well to these short- and mid-term outcomes on the path towards effective advocacy and policy change. Once available, this data will be important for communicating the progress and potential of the Fund’s approach.

Even when more traditional evaluation data on the San Joaquin Valley Health Fund becomes available, stories that document the Valley’s triumphs and challenges will remain an important tool. Continuing to share these stories—via research reports, social media, journalism, and visual storytelling mediums—can make the work of the San Joaquin Valley Health Fund feel more concrete for all stakeholders. For residents and community partners, they are an opportunity to take pride in the changes they are fomenting. For current and potential funders, they demonstrate the early wins that the Fund’s approach is supporting. As Allison Domicone of the Hellman Foundation said, “being able to have more stories about the impact—even if they are just anecdotal—will be really helpful for people who are starting to wrap their head around [movement building and systems change] and get a more tangible understanding of what the work is.”

### **Finding the right level of engagement for funders**

The Fund’s staff already work closely with funders to ensure that contributions align with both the Fund and the funder’s goals. Maintaining this base of funder partners, however, is an ongoing challenge for any pooled fund. Given the breadth of current funders’ priorities, their funding levels, and the size of their funding portfolios, finding the right type of engagement is an important strategy for the Fund’s development.

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**“Being able to have more stories about the impact—even if they are just anecdotal—will be really helpful for people who are starting to wrap their head around movement building and systems change and get a more tangible understanding of what the work is.”**

**–Allison Domicone,  
Program Officer for the  
Hellman Foundation**

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One way that the Fund has done this is to leverage funder partners' unique knowledge and experience, particularly for funders working in areas outside the Fund's own expertise. For example, Carolyn Wang Kong of the Blue Shield Foundation of California recounted her positive experience working to support *Equity on the Mall*. In her conversations with former program officer Amparo Cid, Wang Kong learned of specific communication supports that the Fund needed for the event. "That's where we were able to say 'We have a communications team here who can help,' " she said. "It was a nice win for both of us. That's one thing that's been very unique about this relationship. I feel like we've been able to help on a more strategic level." Continuing to leverage funders' expertise—such as the Rosenberg Foundation's deep knowledge of civic engagement strategies, or the Broad Reach Fund at the Tides Foundation's focus on environmental justice—supports the Fund's efforts to engage funders, and strengthens the Fund's own impact across the range of issues it hopes to influence.

Despite these benefits, not all funders want to become central partners. The Fund's current approach—collaborating closely to align goals, tailoring communication, and identifying additional engagement opportunities—allows for this flexibility in funder participation. Continuing with this approach will help the Fund to find the "right" level of engagement for each funder in its expanding network.

### **Continuing to improve engagement with community partners**

An integral component of the Fund's approach is to ensure that its focus and strategies continue to align with the needs identified by community partners and community residents at large. The majority (71 percent) of funded community partners reported that the Fund effectively solicited their feedback; at the same time, partners also pointed to ways that the Fund could improve the ways in which they are engaged. Suggestions from community partners included:

- **Support new partners in the network.** Some community partners expressed an interest in receiving a more formal introduction to the full scope of supports and activities that the Fund offers. In particular, they noted that they were not clear on how to get involved with groups like the policy committee. Strengthening the system for orienting new community partners may help to increase their engagement in the network.
- **Solicit more feedback on the structure of capacity-building activities.** Some community partners offered suggestions for increasing the utility of capacity-building activities. These suggestions included shortening convenings, putting more emphasis on one-on-one conversations with Fund staff, or creating opportunities for partners to come together around specific topics, sectors, or areas of the Valley. Gathering this feedback from community partners on a regular basis could help to inform current support activities, as well as generate ideas for future activities.
- **Consider a community advisory committee.** The initial listening tour ensured that community residents provided input on the issues they wanted the Fund to focus on. One funder noted that ongoing input from community residents will be important for keeping the Fund's priorities in line with the community's emerging needs. A community advisory committee is one way to ensure that community residents—not just community organizations—have a voice in the Fund's future directions.

## **Moving from community organizing to civic engagement**

The Fund and its partners have begun to energize a movement in the San Joaquin Valley; now, the Fund has an opportunity to move from community organizing and network building to civic engagement and political action. Multiple interview respondents noted that 2018 could be a critical year for taking action. In particular, they noted that political issues that disproportionately affect Valley residents—such as threats to immigration (including protections for recipients of Deferred Action for Childhood Arrivals (DACA) status), changes to environmental protections, and challenges to civil rights—have already activated people to take action. As one community partner asserted, “It is an election year this year. We have an adversarial federal government, and a national election that’s going to be here in a couple years. We are seeing increased civic engagement in response.”

While the Fund’s status as a 501 c(3) organization limits its ability to participate in lobbying activities, partners pointed to ways that the Fund could increase their own efforts to support civic engagement. Specific suggestions include:

- **Encourage partners to share their civic engagement expertise.** Many of the Fund’s partners—including both funders and community partners—have deep experience that can strengthen the Fund’s existing policy efforts. For example, partners pointed to *Equity on the Mall* as an opportunity for partners to register voters. According to one community partner, leveraging this large event for activities like voter registration could “activate people power in a way that is really tangible.”
- **Encourage residents to engage with elected officials.** The Fund has created opportunities—including both *Equity on the Mall* and its San Joaquin Valley Leadership Conference—for Valley residents to meet and hear from state and local elected officials. Partners noted that there is an opportunity now for these elected officials to hear from more of the Valley’s residents. The Fund may want to consider working with its partners to make legislative visits a more central component of *Equity on the Mall*, and encourage partners and residents to stay civically engaged throughout the year through activities such as attending Board of Supervisor meetings, writing letters, and calling elected officials. Timothy Silard, President of the Rosenberg Foundation, underscored the importance of this next step for achieving and sustaining gains: “Unless people are civically engaged, unless they’re voting, unless there’s civic engagement infrastructure, your wins are going to be limited.”
- **Continue to engage youth.** Many funded community partners are already working with youth, and key stakeholders in the region pointed to the continued potential for these youth to become the next generation of leaders in the San Joaquin Valley. “There is a whole coterie of young people coming forward and really tackling a lot of these issues and showing leadership and becoming empowered,” said Sasha Khokha of KQED. “Whether they spend a day in Sacramento or go away to college and boomerang back, or just grow up and become a leader of one of these organizations, that potential for youth leadership is incredible.” With one third of Valley residents under the age of 18, Jahmal Miller of the California Department of Public Health noted that the Fund’s civic engagement activities have the potential to “create the leaders of today and tomorrow, and position them for elected office.” He continued, “That’s a huge opportunity...to create a domino effect, a culture, a movement of real leaders from a local level all the way up to the highest level of government.”

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**“There is a whole coterie of young people coming forward and showing leadership and becoming empowered. That potential for youth leadership is incredible.”**

**–Sasha Khokha, Central Valley Bureau Chief, KQED California Report**

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## **Addressing the Fund's long-term sustainability**

The Fund has grown significantly over the last four years. Currently, new organizations are encouraged to apply for funding each year, and existing community partners may apply for continued funding each year. As a result, the number of partners who receive grants continues to rise. The number and scope of the Fund's activities have also increased. Simultaneously, funders and community partners have expressed interest in increasing the size of mini-grants. While Sierra Health Foundation's own infrastructure has helped to subsidize the cost of administering the Fund, additional funds are necessary to maintain the quality, breadth, and depth of its work.

To accomplish this, the Fund must continue to engage and retain its current funders. In addition, it must also engage new funders who can expand and sustain the work. Current funder partners identified several strategies and messages that could attract these funders:

- **Leverage current funders' networks.** In its earliest stages, leadership at Sierra Health Foundation personally invited funders to join the San Joaquin Valley Health Fund. This approach proved successful because of Sierra Health Foundation's passion and commitment to the work and strong philanthropic network and reputation. Some funders are already serving as ambassadors for the Fund and others have expressed interest in serving as ambassadors as well. Identifying and supporting the funders who are open to (and ready for) this approach could help to attract additional financial support.
- **Highlight benefits for funders.** As previously discussed, the Fund presents funders with an opportunity to increase the impact of their investments to advance health and racial equity. Furthermore, the Fund's structure offers critical on-the-ground knowledge and administrative support for funders who want to increase their investments in the Valley. Current funders have pointed to these benefits as key reasons they continue to stay involved with the Fund; thus, these reasons could also serve as important benefits to highlight for potential funders.
- **Continue expanding outreach and messaging beyond the health funder audience.** The San Joaquin Valley Health Fund's holistic understanding of health—which include the policy platform's focus on health, education, environment, land use, and immigration—positions it to appeal to non-health funders. While the Fund clearly communicates the range of factors that are part of their definition of health, non-health funders may use a different framework for identifying funding opportunities and tracking their progress. Becoming familiar with these other frameworks—including those related to civic engagement—will help non-health funders to see the Fund as a like-minded partner who can help them to further their own causes.
- **Highlight connections between the success of the San Joaquin Valley and the success of the entire state.** Although the San Joaquin Valley can seem far-removed from the rest of California, people in the Valley have deep ties to other parts of the state. Residents work and have families outside of the area, and people from across the San Francisco Bay Area, Northern California, and Southern California continue to move to the San Joaquin Valley. Several funders and key influencers noted that an emphasis on these connections could infuse additional resources from statewide and national funders. As explained by Pablo Bravo of Dignity

Health, the Fund could benefit from saying that “although it is focused on the San Joaquin Valley, successes in the San Joaquin Valley can impact the rest of the state. That can be a good way to entice partners to come to the table.”

- **Emphasize the opportunity to learn from the Fund’s approach.** The San Joaquin Valley is just one example of the hundreds of regions across the United States that are experiencing health inequities, racial injustice, and a lack of public and private resources. Therefore, funders may be attracted to the Fund as an opportunity to inform their investments in other parts of the country. Additionally, national funders with specific policy interests may find it advantageous to partner with the Fund because it connects them to California’s policy initiatives, particularly as California continues to lead on issues such as immigration, environmental justice, and civil rights. 🇺🇸

# Looking ahead

The Fund's next phase presents an opportunity to build on its early successes and incorporate the lessons learned during its initial years. Looking ahead, key focuses of the Fund will be:

- **Growing the movement in the San Joaquin Valley.** The Fund has accomplished key early wins during its initial years, including drawing attention to the Valley's needs, increasing partners' capacity to advocate for policy change, establishing a collective policy agenda, and strengthening partnerships and collaboration between organizations. As their work progresses, the opportunities to create lasting change at the community, organizational, and systems level will continue to emerge. Building on this strong foundation, the Fund will continue offering grants to organizations in the San Joaquin Valley. These grants will include ongoing mini-grants and cluster grants, as well as future funding strategies such as social impact investing. In addition, the Fund will continue to engage funders, state and local officials, and other key stakeholders who can support the Valley's efforts to achieve health and racial equity.
- **Strengthening its approach.** The Fund's key strategies—including supporting leadership development, amplifying community voice, and reinforcing local organizations' capacity to organize and advocate for change—have been important contributors to its early successes. The Fund intends to continue using these strategies while incorporating lessons learned that can strengthen their approach. These opportunities include leveraging partner strengths to increase their engagement and the Fund's achievements, and exploring ways to further integrate civic engagement into its work.
- **Sharing the Fund's model to grow a national movement.** While the California context is unique, other regions throughout the United States—including Appalachia, the South, and the Southwest—share the San Joaquin Valley's experiences of persistent poverty and racial, economic, environmental, educational, and social discrimination. The Fund's innovative model—including its infrastructure, focus, and strategies—therefore has applications outside of the San Joaquin Valley. Just as The Center will continue sharing the Fund's story with its immediate stakeholders, it also plans to share its progress with the philanthropic field more broadly, encouraging others to consider the potential of this approach to improve health and racial equity across the country.

The Fund and its partners share a commitment to improving health and well-being for all communities in the San Joaquin Valley. Although residents of the Valley continue to face deep-rooted challenges, the Fund's first years have strengthened community-driven efforts to change inequitable systems and policies. By beginning to acknowledge and address these policies in the San Joaquin Valley, residents are more prepared to raise their voices, decision-makers are more ready to listen, and funders are more invested. Building on this movement for change will continue to increase the Fund's ability to achieve its vision of a healthier and more equitable San Joaquin Valley. 🏡



# Appendix

## Funders of the San Joaquin Valley Health Fund

The San Joaquin Valley Health Fund's funder partners include\*:

- Sierra Health Foundation
- The California Endowment
- Rosenberg Foundation
- The California Wellness Foundation
- W.K. Kellogg Foundation
- Blue Shield of California Foundation
- Wallace H. Coulter Foundation
- Dignity Health
- The Broad Reach Fund at the Tides Foundation
- Hellman Foundation
- The James Irvine Foundation
- Convergence Partnership
- Health Net
- The Grove Foundation
- Werner-Kohnstamm Family Giving Fund
- New Venture Fund
- Sunlight Giving
- Heising-Simons Foundation

\* Current as of November 2018.

## Methods

This report draws on data collected from the following sources:

- **Document review.** A systematic review was conducted of key documents detailing the impetus, evolution, and implementation of the San Joaquin Valley Health Fund. These documents included grant materials such as Requests for Proposal and applicant analyses; research reports; presentations about the Fund; and logic models and other graphics that illustrated the components of the Fund.
- **Interviews with funder partners.** From December 2017 to February 2018, semi-structured interviews were conducted with 10 funders contributing to the San Joaquin Valley Health Fund. Interview respondents were asked about their involvement with the Fund, their experience with its early years, and perceptions of the Fund's successes, challenges, and future opportunities. Interview respondents included:

- Fatima Angeles, Vice President of Programs at The California Wellness Foundation
- Ellen Braff-Guajardo, former Program Officer at the W.K. Kellogg Foundation and current Senior Program Officer at Sierra Health Foundation
- Pablo Bravo, Vice President at Dignity Health
- Allison Domicone, Program Officer at Hirsch & Associates, Hellman Foundation
- Craig Martinez, Program Manager at The California Endowment
- Andrea Perry, Program Officer for the Broad Reach Fund at the Tides Foundation
- Melina Sanchez, Program Officer at The James Irvine Foundation
- Timothy Silard, President of the Rosenberg Foundation
- Carolyn Wang Kong, Senior Program Officer at the Blue Shield of California Foundation

In addition, a group interview was conducted with staff of the San Joaquin Valley Health Fund and Sierra Health Foundation. Interview participants included:

- Leslie Cooksy, Evaluation Director at Sierra Health Foundation
  - Nora Dunlap, Senior Program Associate at the San Joaquin Valley Health Fund
  - Kaying Hang, Director of Health Programs at Sierra Health Foundation
  - Diane Littlefield, former Vice President of Programs and Partnerships at Sierra Health Foundation
  - Socorro Santillan, Program Officer at the San Joaquin Valley Health Fund
- **Interviews with key stakeholders.** From January to February 2018, semi-structured interviews were conducted with ten external stakeholders from 8 organizations that who were identified by the San Joaquin Valley Health Fund as key influencers in the region. Interview respondents were asked about their involvement with the Fund, their experience with its early years, and perceptions of the Fund’s successes, challenges, and future opportunities. Interview respondents included:
    - Natalie Garcia, Development Director at the Community Water Center
    - Sukaina Hussain, Organizer at Faith in the Valley
    - Daniel Jimenez, Organizing Coordinator at the Community Water Center
    - Sasha Khokha, Central Valley Bureau Chief for KQED’s California Report
    - Andy Levine, Fresno County Director of Faith in the Valley

- Jonathan London, Associate Professor of Psychology and Director of the Center for Regional Change at the University of California, Davis
  - Jesus Martinez, Chair of the Central Valley Immigrant Integration Collaborative
  - Ron Milam, Interim Director of Smart Growth California
  - Jahmal Miller, former Deputy Director of the Office of Health Equity at the California Department of Public Health
  - Jonathan Nelson, Policy Director at the Community Water Center
  - Sarah Reyes, Regional Program Manager, Central Valley, at The California Endowment
- **Survey of funded partners.** In November 2017, 73 funded community partners of the San Joaquin Valley Health Fund—including current and former funded partners, as well as mini-grant and cluster grant recipients—were invited to complete a survey about their experience with the Fund. This survey asked partners about their satisfaction with the Fund, the skills and knowledge they gained from participation, and feedback on the Fund’s structure and activities. In total, 38 complete responses were received (53 percent response rate).<sup>11</sup>



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