



Caring for the Poor... Strengthening Our Communities

2018 Annual Report



St. Joseph Health 
Community Partnership Fund



Our Mission

The St. Joseph Health Community Partnership Fund, as an extension of Christ's healing ministry, provides funding and assistance to improve the health and well-being of the economically poor, and utilizes the strengths and diversity of our neighbors to build vibrant communities.

Since 1987, the Community Partnership Fund has allocated more than \$330,000,000 to support Care for the Poor programs and partner organizations that serve St. Joseph Health communities.

Letter from the CEO and Board Chair



Gabriela Robles



Rosie Perez

Dear Community Partners,

Since 1987, the St. Joseph Health (SJH) Community Partnership Fund has provided more than \$330 million in grants to support Care for the Poor programs and nonprofit organizations working to improve the health and well-being in the communities served by St. Joseph Health.

While our initiatives may have changed over the years, our mission has never wavered. The Fund provides grants and other support to improve the health and well-being of the economically poor, and fosters the strengths and diversity of our neighbors to build vibrant, healthy communities.

Through initiatives that build strong resident leaders, investments designed to bolster nonprofits and community resilience, and through grants specifically targeting the needs of food, shelter and disaster recovery, the Fund focuses on the system inequities that impact the health of the poor. We are proud to share our most recent efforts in this report.

Today, the Fund is embracing an exciting opportunity – bringing the work of the Fund to the entire system of Providence St. Joseph Health. In partnership with key stakeholders and regional leadership, the Fund will be planning how to scale this community strengthening model to new locations, bringing the legacy of the Sisters of St. Joseph of Orange into more than 50 communities throughout our health system.

On behalf of the Board and Staff of the SJH Community Partnership Fund, we are excited to share the achievements of 2018 with our partners and stakeholders, and continue to be grateful for this opportunity to serve our dear neighbor.



Gabriela Robles
Chief Executive, SJH Community Partnership Fund



Rosie Perez
*VP, Mission Integration, Providence St. Joseph Health
Board Chair, SJH Community Partnership Fund*

The Work of the Fund

The SJH Community Partnership Fund makes strategic investments in the health and well-being of communities served by our health system. The Fund works to reduce health disparities and promote equity by investing in systems-level impacts on community health issues, and strengthening partnerships and collaboration. Our investments fall into the following four categories: building capacity and partnerships, promoting justice and community leaders, investing in best practices and new ideas, and caring for the vulnerable.



Building Capacity & Partnerships

The Fund works to build the capacity of community-based organizations partnering with our system hospitals. Through core operating grants, technical assistance, investment loans, and strategic partnerships, the Fund invests in the nonprofits that serve the health needs of their communities.

The Fund's **Sustainability Initiative** is a 5-month program that engages regional nonprofits who are critical to the safety net of services, and who are struggling with organizational sustainability and capacity. Executives and board members come together in monthly learning sessions to study key principles of sustainability and organizational development with experts. The program also connects them to one-on-one coaching to help leaders grapple with their own sustainability challenges and find ways to evolve, leverage, and grow programs in impact and relevance.

Promoting Justice & Community Leaders

In support of our health system's guiding principles, the Fund stands in solidarity with the most vulnerable, working to promote justice by investing in the residents who live in the communities we serve. Two of our initiatives focus on building community leaders and addressing system inequities throughout California.

The **Community Building Initiative** engages residents in a four-year commitment to address community health issues in their neighborhoods. Residents are provided long-term leadership training and coaching as they journey through the identification of priority issues, and build plans to address them in partnership with local hospitals and nonprofits.

The **Intersections Initiative** is a three-year, \$6 million effort across 7 regions of California. Designed in partnership with Prevention Institute, a national leader in solving complex social and health issues, Intersections helps hospitals and regional stakeholders design community-based strategies to address community health issues that complement clinical coordination and population health efforts throughout the health system.

Investing in Best Practices

The Fund invests in innovative solutions and best practices for improving the emotional and physical well-being of individuals in vulnerable communities. Examples of our Innovation Grants in 2018 include:

- Support for **Project Kinship**, a community-based organization utilizing trauma-informed care, restorative justice, and workforce development strategies to support people who were formerly incarcerated as they reenter their communities.
- Support for **Orange County Opportunity Initiative**, a regional effort to increase access to legal services for immigrants needing administrative relief through coordination, civic engagement, and advocacy.

Caring for the Vulnerable

At the heart of the Fund is our legacy to care for the most vulnerable. Our more traditional grant-making focuses on two areas.

When disaster strikes in one of the communities we serve, the Fund quickly engages its **Disaster Response & Preparedness Initiative**. Coordinating with local hospitals, the Fund works to bolster the efforts of nonprofits on the front line of relief, then stays engaged with supportive and strategic investments as the region works its way through recovery.

The Fund's **Emergency Food & Shelter Initiative** deploys \$1 million annually to nonprofits engaged in direct service support to the homeless and the hungry.



\$1,000,000 Deployed Annually



to support the homeless
and the hungry



Humboldt Community Building Initiative



A Community-Centered Grant Initiative

The Community Building Initiative (CBI) helps develop resident-based capacity to determine and implement positive change in low-income communities served by St. Joseph Health. The CBI focuses on four key pillars to developing resident capacity: engagement of community residents, development of resident leaders, collaboration among organizational partners, and bridge building with external decision makers. Each CBI grant is a four-year investment – funding for a year of planning and incubation, followed by three years of funding for implementation of selected strategies to address identified community issues. Each region also receives a consulting coach to help guide its development.

The Fund supports three CBI sites in Humboldt County, all of whom are focused on safety as the community issue that is most important:

- Westside of Eureka, in partnership with the Westside Community Improvement Association and the California Center for Rural Policy
- The Samoa Peninsula, in partnership with the Redwood Community Action Agency
- Bridgeville, in partnership with the Bridgeville Community Center

Each community develops a strategy to its specific opportunities, resources, and challenges. At the end of the three-year grant period, improvements may be measured in both physical/infrastructure improvements and through the development or enforcement of community-informed codes, policies, and laws. More importantly, the hope is that after the CBI grant period ends, there will remain an empowered base of community residents, engaged in other efforts to improve their community and well-being.

Innovation Grant for Re-Entry Services



A Trauma-Informed Approach to Re-Entry

The Community Partnership Fund looks to invest in partners that offer innovative solutions that improve our communities and promote justice and equity. One such partner is Project Kinship, a community-based organization utilizing trauma-informed care, restorative justice, and workforce development strategies to support people who were formerly incarcerated as they re-enter their communities. Project Kinship was the vision of two community leaders with a heart for formerly incarcerated individuals and an understanding of the cycle of violence and poverty impacting their families. Started in 2014, the organization has quickly grown and now serves thousands of residents in Orange County, California, each year. With this accelerated success came significant stress on the organization's founders and some setbacks in their organizational development. A strategic grant from the Fund, as well as guidance from Fund staff, helped the organization focus on capacity building, strategic planning, and address the cash flow pressures of receiving government contracts.

Project Kinship recently celebrated its fourth year of service, a new 8,000 square-foot facility, a budget of \$3 million, and a team of 30 dedicated staff. The Fund will continue to support their innovative model, and partner with them to sustain this important work in the community.

High Desert Sustainability Initiative

Strengthening Organizations that Support Our Communities

Two hours east of Los Angeles, the Victor Valley area of California is located in the High Desert section of the Mojave Desert. While the Valley's population is similar to that of Oakland, almost 400,000, it does not have the advantages of proximity to other large urban areas. As a result, there is not a strong economic base in the area; approximately half of the employed residents of the Victor Valley make long commutes to jobs outside of the area.

Access to resources, food insecurity, housing affordability, mental health and substance abuse, and crime and safety are significant community issues in the region, where 40% of households live below 200% of the federal poverty level. These factors combine into a substantial need for support services from nonprofits, a majority of which are small and struggling to address the needs of the community.

The Community Partnership Fund's Sustainability Initiative helps grantees in its service areas become more sustainable and effective. In partnership with the local St. Joseph hospital, St. Mary Medical Center, the Fund brought together five High Desert nonprofits, critical to providing safety net services for the region, to focus on their organizational sustainability and capacity. The program offered monthly learning sessions for both executive and board leadership, an organizational assessment, and extensive one-on-one coaching for grantees to build sustainability plans for each organization. Session topics included: moving from crisis to planning, succession planning and leadership development, board development, risk management, evaluation, and making the case for operating support.



- A Better Way, services for domestic violence survivors
- Community Action Partnership of San Bernardino County, a provider of food, family development, and utility services for low-income families
- Community Health Action Network, a provider of emergency services, referrals, and health education to at-risk residents
- High Desert Homeless Services, the only full-service homeless agency in the Victor Valley area
- St. John of God Health Care, a treatment and rehabilitation center for substance abuse and dependence

The Initiative provides more than \$150,000 in resources for the grantees during the five-month program, including coaching, training, and grants for core operations and capacity building. But the long-term impact is much greater, as the process leads to more effective leaders and stronger organizations which are better able to meet the needs of their communities. Grantees themselves have listed the key benefits of the sustainability process as being:

organizations which are better able to meet the needs of their communities. Grantees themselves have listed the key benefits of the sustainability process as being:

1. Increased capacity of executive and board leadership
2. Stronger relationships between staff and board members, and a clearer understanding of roles
3. Executive directors are better able to move from a crisis mindset to a planning orientation
4. Executive directors better understand the structural issues inside their own organization
5. Executive directors embrace succession planning and leadership development as critical organizational investments
6. Stronger relationships between community organizations and local hospital community benefit leads



Intersections Initiative

Working to Achieve Health Equity and Community Resilience in California

What does it look like when a hospital and major health system collaborate with multi-sector partners to improve health equity and create wellness outside of hospital walls? This is the question that is being explored by the Intersections Initiative. From 2018 through 2020, this initiative will support the formation and development of local coalitions focused on improving health and advancing health equity in the communities served by the seven St. Joseph Health Hospital Ministries in California. In each location, a diverse group of partners work with their local hospital to build community resilience.

The seven coalitions funded through the Intersections Initiative are working on social determinants of health, such as housing, education, civic engagement, and economic stability. They are taking on these issues through comprehensive strategies that include creating policies, changing organizational practices, and strengthening systems to support health, wellness, and resilience. *Since upstream community prevention* lies at the heart of the Intersections Initiative, many of the funded strategies address multiple social determinants of health at once, creating the potential for even greater impact.

Each coalition is supported by their local hospital community benefit team, and led by a community-based backbone organization. While many healthcare organizations are interested in how social determinants of health impact patient outcomes, the defined role that health organizations can play in addressing those issues has been less clear, especially when considering health equity. In addition to actually building community resilience and promoting policy change, the Intersections Initiative will generate learnings to illuminate the specific role that healthcare organizations have, in partnership with others, in advancing health equity through upstream strategies.

Ultimately, the Intersections Initiative aims to break down barriers to advancing health equity and recognizes that there is huge potential for the role that healthcare can play in achieving success within a community-based collaborative.



Building Community Resilience in Sonoma and Napa Counties after the Fires



Long after the disaster is over, we're still there.

In October 2017, wildfires spread across Northern California, claiming at least 43 lives. Sonoma and Napa Counties were the most devastated, suffering the destruction of thousands of homes, clinics, and businesses. Over 1,500 local school children lost their homes. More than 150 caregivers and physicians serving at St. Joseph Hospitals lost their homes, and many more were displaced.

The impact of disaster is borne in large part by community-based organizations in a region, which must respond to the emergency in the moment, and then help community members rebuild and recover from the trauma over the longer term. In Sonoma and Napa, the Fund convened community stakeholders across the region's identified recovery priorities – housing, mental health, and supporting the most vulnerable – to support coordination of long-term efforts that will strengthen the region's system of care.

The Fund has also committed to bolstering Sonoma and Napa's long-term recovery planning by providing strategic investment to community-based organizations, and by building up the voice of marginalized communities.

In 2018, the Fund provided more than \$1 million in Emergency Food & Shelter Grants across the state, and plans to invest the same in 2019. In 2018, the Fund provided more than \$200,000 in Napa and Sonoma to support impacted food and shelter programs.



Providence St. Joseph caregivers from every region responded to the disaster with heart, giving more than \$470,000 in cash donations and more than 6,500 hours of donated paid time off in support of impacted caregivers.

Our Board

Rosie Perez

Board Chair
Vice President, Mission Integration
Providence St. Joseph Health

Joel Gilbertson

Sr. Vice President, Community Partnerships
Providence St. Joseph Health

Sr. Suzanne Sassus, CSJ

Founder, St. Joseph Health Community Partnership Fund
Sisters of St. Joseph of Orange

Jo Ann Escasa-Haigh

Board CFO
EVP and CFP Operations and Business Development
Providence St. Joseph Health

Ava Steaffens

Chief Executive Officer
Christian Community Development Association

Judy Wagner

Chief Mission Integration
St. Joseph Health, St. Mary

Kathy Hayes

Board Secretary
Community Member, Humboldt County, CA

Mary Anne Foo

Executive Director
OCAPICA

Fund Leadership



Gabriela Robles

Chief Executive
Community Partnership Fund



Jason Lacsamana

Senior Program Officer
Community Partnership Fund



Alisa Barrios

Grants Manager
Community Partnership Fund

Our Staff



Charmaine Thames-Conley

Senior Accountant
Providence St. Joseph Health



Christine Bui

Director, Finance
Providence St. Joseph Health



Jim Watson

Deputy General Counsel
Providence St. Joseph Health

Our Partners and Affiliations



Sonoma County
Funders Circle



UCLA CENTER FOR
HEALTH POLICY RESEARCH



ORANGE COUNTY
GRANTMAKERS

PREVENTION
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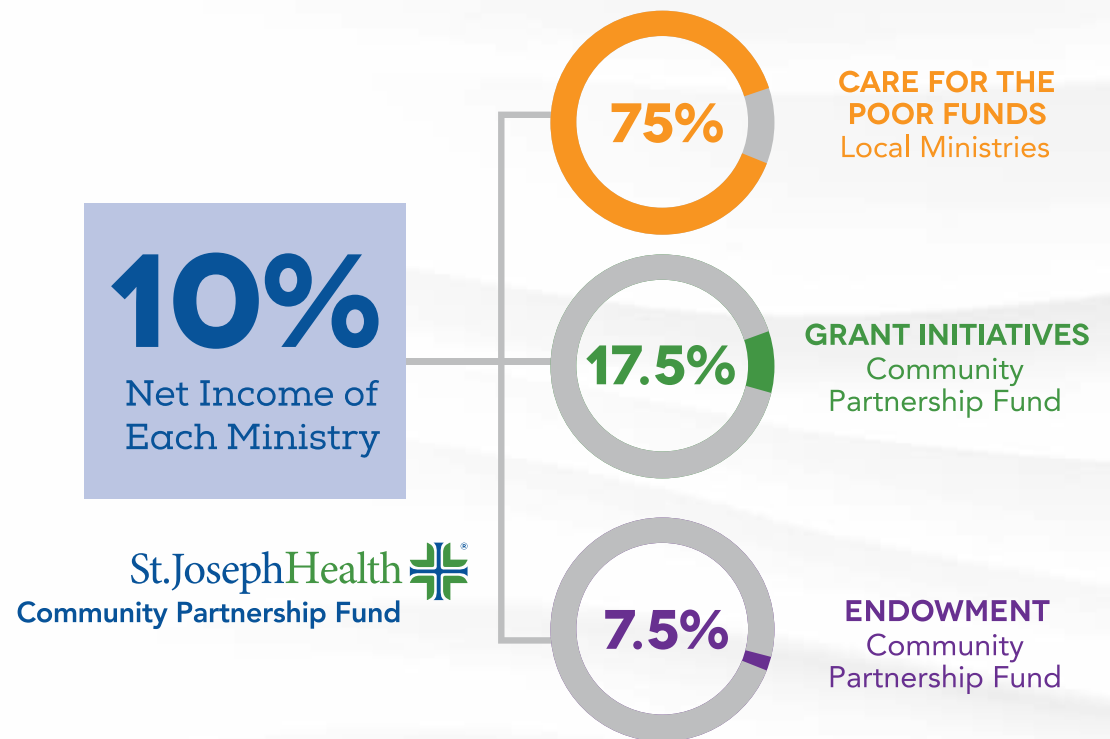
SOUTHERN CALIFORNIA
GRANTMAKERS

How the Fund Works with Community Benefit

In 1986, St. Joseph Health worked to further its commitment to the poor by creating a plan to transcend traditional efforts of providing care for those in need. The SJH Community Partnership Fund was created as a result of that plan, designed to work in partnership with each hospital community benefit department to improve the health of low-income individuals residing in local communities. The Fund is an independent, 501(c)(3) private foundation that exists to support SJH, and works under the governance of a board that is comprised of Providence St. Joseph Health executives and community experts.

In addition to providing grants and capacity building investments to community partners, the Fund helps guide and approve the Care for the Poor Allocations for each St. Joseph Health Ministry, each year.

The SJH Community Partnership Fund currently receives 10% of the net income of each hospital ministry in California. That 10% is allocated into three distinct investment areas: Care for the Poor Funds, which go directly back to local initiatives and investments identified by each hospital, Grant Initiatives, and the Fund's Endowment, which exists to support hospital community benefit efforts when net income is not achieved



CY 18 Grant Making and Care for the Poor Allocations

CY 18 Grant Activity

Sustainability Initiative	\$	67,555.00
Community Building Initiative	\$	755,000.00
Intersections Initiative	\$	1,029,710.00
Innovation Initiative	\$	67,500.00
Emergency Food and Shelter Initiative	\$	1,115,000.00
Disaster Response	\$	107,333.00
Other Grants	\$	28,500.00
	\$	3,190,598.00
Technical Assistance Coaching	\$	223,914.00
Regional Capacity Building	\$	345,000.00
Grantmaker & Funder Collaboratives	\$	31,208.00
	\$	610,914.00

CY 18 Care for the Poor Allocations

St. Joseph Hospital, Eureka	\$	1,212,500.00
Redwood Memorial Hospital	\$	350,000.00
Santa Rosa Memorial Hospital	\$	4,258,263.00
Petaluma Valley Hospital	\$	271,737.00
Queen of the Valley Medical Center	\$	150,000.00
St. Mary Medical Center	\$	1,594,992.00
St. Jude Medical Center	\$	5,136,432.02
St. Joseph Hospital, Orange	\$	3,740,501.11
Mission Hospital	\$	2,020,228.41
Covenant Health	\$	2,297,718.35
TOTAL	\$	21,032,371.89

Balance Sheet 2018

	Dec-18	Dec-17
ASSETS		
Cash and Equivalents	\$ 2,702,812.00	\$ 3,995,744.00
Hospital Reserves (Care for the Poor)	\$ 135,332,276.00	\$ 122,824,332.00
Other Receivables	\$ 768,533.00	\$ 3,784.00
Limited Assets	\$ 39,699,274.00	\$ 39,794,400.00
TOTAL ASSETS	\$ 178,502,895.00	\$ 166,618,260.00
LIABILITIES		
Accounts Payable	\$ 227,600.00	\$ 1,650.00
Affiliates Payable-Current	\$ (1,069,360.00)	\$ (1,717,161.00)
Hospital Reserves (Care for the Poor)	\$ 135,332,276.00	\$ 122,824,332.00
Other Current Liabilities	\$ 2,087,644.00	\$ 1,031,261.00
TOTAL LIABILITIES	\$ 136,578,160.00	\$ 122,140,082.00
NET ASSETS		
Unrestricted	\$ 41,924,735.00	\$ 44,478,178.00
TOTAL NET ASSETS	\$ 41,924,735.00	\$ 44,478,178.00
TOTAL LIABILITIES AND NET ASSETS	\$ 178,502,895.00	\$ 166,618,260.00

CY 18 Balance Sheet



The Impact of the Fund



Through all our investments, the SJH Community Partnership Fund seeks to promote health equity – the idea that everyone has the same opportunity to live a long, healthy life. Our initiatives and partners may change, but our focus never does.

BUILDING CAPACITY & PARTNERSHIPS

SUSTAINABILITY INITIATIVE

REGIONAL CAPACITY BUILDING

TECHNICAL ASSISTANCE

Build community capacity
Leverage other funding efforts
Strengthen regional infrastructures
Seek strategic partnerships
Provide PRIs to community nonprofits

PROMOTING JUSTICE & COMMUNITY LEADERS

COMMUNITY BUILDING INITIATIVE

INTERSECTIONS INITIATIVE

Build community leaders
Change systemic inequities
Promote advocacy and
civic engagement

INVESTING IN BEST PRACTICES & NEW IDEAS

RESEARCH AND EVALUATION

INNOVATION GRANTS

Invest in innovation in the health field
Promote best practices
Support system-wide goals

CARING FOR THE VULNERABLE

DISASTER RESPONSE & PREPAREDNESS

EMERGENCY FOOD & SHELTER

Focus on the needs of the poor
and socially disadvantaged
Build community resilience

INITIATIVE GOALS

We envision communities where all people live with optimum health and wellness. The Community Partnership Fund is a bridge between our legacy as a Catholic health system and our future as a dynamic health partner in our communities. We continue to seek proactive ways to support our communities, our caregivers, and our most vulnerable throughout our system towards the achievement of health equity.





stjoe.org/CommunityPartnerships

St. Joseph Health 

A Ministry Founded by the Sisters of St. Joseph of Orange