



Webinar on Advancing Wellness  
October 7, 2014

Maricela Cueva: Good morning, and welcome to the California Wellness Foundation webinar on Advancing Wellness, our new grantmaking program. My name is Maricela Cueva and I'm with VPE Tradigital Communications, a consultant of Cal Wellness. We are delighted to have over 500 participants joining us today...

We will start things off with an overview of the strategic planning that informed our new direction. We will then present a summary about the four portfolios within Advancing Wellness, and we will give an introduction to our brand new Cal Wellness Grants Portal. We will then have a dedicated portion to answer your questions.

With that, it's my pleasure to introduce our speakers today: Judy Belk, President and CEO of the California Wellness Foundation, Fatima Angeles, Vice President of Programs at the Foundation, and Amy Scop, the Director of Grants Management.

I'd now like to introduce Judy Belk, Cal Wellness President and CEO.

Judy Belk:

I hope you've had an opportunity to surf our redesigned website and read about our new grantmaking priorities. These are changes that we don't take lightly. They were informed, in part, by your work, your expertise, your knowledge, and we see this as an evolution of this foundation's legacy. While there's much that's new, and we will

touch on many of the new areas, other important things remain the same.

First, we'd like to call the 'Wellness Approach'. One, we remain committed to being responsive to requests from our partners. We believe that you, close to the ground, know best what's happening in your community, and we will continue to tap on that expertise.

The other issue is that we will continue to prioritize core-operating support. We know that you need critical resources to continue your efforts in Advancing Wellness.

And third, we will continue to invest in resources and public policy. We only have to look at the passage of the historical Affordable Care Act to know that philanthropic resources alone cannot advance wellness.

And, of course, we want to continue our support for leadership in the non-profit sector. We know that it's really you, many of you everyday working hard, sometimes with limited resources, with challenges, trying your best on a day-to-day basis to advance wellness. And we want to continue to provide you the opportunity to learn from each other, to take a sabbatical every now and then to reenergize. And we continue to want to applaud you for all that you do in Advancing Wellness.

Second, we want to talk a little bit about embracing the social determinates of health. That is the lens in which we've approached

our new Advancing Wellness. You know as I do that health and wellness is often impacted by external circumstances: where people live and work, their race, their place of employment or income can impact their health and wellness. So we've really tried to develop a strategy that's interconnected, that all of these issues are really important, grounded in research on the social determinates of health.

We also have an opportunity fund that will continue to encourage innovation in the non-profit and philanthropic sectors. We've got much to share, we are so excited. One of the best decisions that I've made in my first six months of the job was having the pleasure of appointing Fatima Angeles as Vice President of Programs.. So I want to give her the opportunity to dig in deep to inform you on the new legacy, the new chapter for Cal Wellness. Fatima?

Fatima Angeles: Thanks so much, Judy. I really appreciate that.

The first portfolio of Advancing Wellness that we'd like to share with you today is titled 'Bridging the Gaps In Access and Quality Care.' We believe that all Californians, particularly those living in the state's most vulnerable communities, should have access to quality healthcare services. In this portfolio, we are focusing on four areas and an initiative opportunity.

The first area is named 'Advancing Health Care Reform and the Affordable Care Act.' The passage of the ACA presented great opportunities for equitable health coverage, but we know that more

needs to be done. Our funding works to ensure access to health coverage and access to healthcare for the remaining uninsured in California, including those not eligible because of immigration status. Funding also supports efforts that benefit vulnerable populations, such as those eligible for insurance assistance through healthcare reform.

Our second area is 'Strengthening Community Clinics and Safety-Net Partners.' Community clinics and safety-net partners operate on the front lines of healthcare for vulnerable populations. We aim to both sustain and improve the quality and breadth of services of community clinics and other safety-net providers that serve vulnerable communities, and increase the number of under-represented minorities employed in community clinics.

Our third area under this portfolio is 'Improving Oral Health Care for Low-Income Adults and Seniors.' We want to address the well-documented gaps in access to, coverage for, and quality of oral healthcare for low-income adults and seniors.

The fourth area in this portfolio is 'Increasing Diversity in the Health Professions.' A workforce that mirrors the diverse population of California increases access to care and improves quality of care. We seek to strengthen and develop pathways to healthcare sector jobs for underrepresented minorities in the health professions.

And lastly, to our grantmaking initiative, we will proactively support the provision of tailored prevention, primary care, health education and outreach to women of color at risk for or living with HIV/AIDS and other sexually transmitted infections.

Our second portfolio is 'Promoting Healthy and Safe Neighborhoods.' We believe that wellness is promoted when neighborhoods are economically and environmentally vital, socially connected, civically engaged, and safe. There are two issue areas targeted within this portfolio.

The first is 'Fostering Healthy Environments.' A healthy environment includes clean air, water, and healthy food, as well as access to safe and open spaces and recreational activities. We want to ensure that effective systems, infrastructure, and resources are in place to address environmental inequities and support healthy living in underserved, low-income communities.

The second area in this portfolio is 'Supporting Violence Prevention.' Like many health issues that face neighborhoods across our state, the causes of violence, gun violence in particular, are complex. Cal Wellness seeks to minimize trauma and injury and fortify communities to be safe and healthy for all of its residents.

Our third portfolio is 'Expanding Education and Employment Pathways.' We know that education and employment are strong predictors of good health. Research indicates that a person's health improves as income level rises. Education is a pathway to better

jobs, living wages, and greater opportunities for individuals to improve their health and wellness. Within this portfolio, there are two issue areas and an initiative opportunity.

The first issue area is 'Increasing Educational Opportunities for Resilient Youth.' Because the completion of post-secondary education goals greatly improves health outcomes, we are committed to charting a path to increasing access to resources, opportunities, and support for adolescents and young adults we term as 'Resilient Youth.'

We define Resilient Youth as young people, ages 14 to 26, who are in or have exited the juvenile justice system, are current or former foster youth, have been or are currently homeless or runaways, or are pregnant and are parenting youth who are under these circumstances.

Our second area under this portfolio is 'Promoting Employment and Asset-Building Opportunities.' Health is supported by access to sufficient income and other resources through fair employment and appropriate government benefits. As well as the building and protection of financial assets, our funding seeks to strengthen pathways to obtaining and retaining employment to improve health outcomes. In addition to our commitment to Resilient Youth, we seek to strengthen opportunities for military veterans and formerly incarcerated adults.

Lastly, we're launching a grantmaking initiative that will include a cohort of programs and policy efforts that improve the economic well being of women exiting the criminal justice system, and women who are formerly incarcerated.

Last, but not least, is our Opportunity Fund. This was established to fund investments in organizational capacity building by advancing public policy, to promote innovative responses to emerging health needs, and to learn about trends and issues in California that influence health. Within this portfolio, there are three issue areas.

First is 'Advancing Public Policy.' Grantmaking in this area will complement our public policy efforts within our other portfolios to address issues from a systemic perspective. Cal Wellness seeks to support efforts focused on improving public policies and conditions for underserved Californians using a range of activities such as public policy education, advocacy, civic engagement, and analysis.

Our second area under the Opportunity Fund is 'Investing in Capacity Building.' Capacity building enhances the effectiveness and impact of non-profit leaders and organizations in the non-profit and philanthropic sectors. We want to support institutions in these sectors to achieve organizational and financial stability, improve program quality, promote growth, and ultimately realize greater social impact.

Our third area under the Opportunity Fund is 'Promoting Innovation.' Promising pilot projects and innovative approaches

have the potential to significantly improve the health of those most in need in our state. Cal Wellness seeks to respond to emerging health needs and learn about trends and issues in California that influence health. Most grants in this area are short term, about one year in duration, and are set aside for projects that fall outside our other funding priorities. We support activities that address health and wellness in underserved communities using unique approaches and tools such as the arts, technology, data, multimedia communications, and partnerships.

I would now like to introduce Amy Scop, our Director of Grants Management, who will give us a demonstration of our new online application process.

Amy Scop:

Thank you, Fatima.

As was mentioned previously, we're still committed to being responsive to requests from you and the communities that we serve. With that, we once again are accepting letters of interest on an ongoing basis, and now you can apply for funding entirely online.

We're very excited to share the Cal Wellness Grants Portal. Through an extensive development and testing process, and incorporating feedback from grantees and staff, we created a more streamlined letter of interest application. Once you go to the Cal Wellness website, you will see the 'How to Apply' link on the top. Click on that link and you will be taken to the page that gives you more information about our application process, the eligibility

criteria, and how to apply online. After reading through our guidelines, you can access the Grants Portal to begin your letter of interest application, often known as LOI, which is the starting point for our funding process.

There are three pieces of information you need to know about the Cal Wellness Grants Portal: one, how to create an account, two, how to start a new LOI or letter of interest, and three, how to return to your account.

First, before applying, you need to create an account. Every organization new to the portal must create an account even if you've received a grant from us before. To do so, click on the Start a New LOI button on the How to Apply page. This will take you to the Cal Wellness Grants Portal. Once in the portal, click on Create a New Account under the email login. On the New Applicant page, type in the information requested, and then click Continue. Your account has been created and you will receive an email confirmation shortly.

Second, to start an LOI application, read through the funding eligibility. If your organization and request meet the criteria, select 'Yes' and it will take you to the rest of the LOI application. Once in the application, read through the letter of interest instructions. There's also an LOI application guide that you can download for more detailed step-by-step instruction.

Let me briefly show you the LOI application. The first two sections are questions about the organization, such as organization name,

address, primary contact for the LOI, current operating budget, and so forth. Under 'Request Details' you can select which grantmaking program best reflects your request as well as add the request amount, duration, and a brief summary of the request.

Before submitting your LOI, you will also need to upload a one to two page request narrative. More details about what to include in the narrative is described on this page. You can also find more information in the LOI application guide. On this page, there is also a feedback section to add your suggestions for improving the online LOI application and Grants Portal.

If you need to save and exit the LOI before submission, you must click on the 'Save and Finish Later' button at the bottom of the page to insure your information will be saved. I'll go over how to get back to this in just a bit. If you are ready to submit your LOI application, you can click on the 'Review and Submit' button at the bottom of the page. You will be asked to review the information one more time before clicking on 'Submit.'

Once you submit your application, you will receive an email with your application information for your records. Within a few days of your online submission, you will receive a second email letting you know your LOI is under review. Each letter of interest submitted will be reviewed by a member of our program team. You will receive notification of the status of your request approximately three months from the date the email was sent.

Lastly, I want to show you briefly how to return to your account. You will need to go back to our website and go to the 'How to Apply' page. Click on 'Return to Your Account.' It will take you again to the Cal Wellness Grants Portal. Now that you already have an account, you will just need to type in your email login and password. The login will look the same as when you start a new LOI, however, once you log in, you will be directed to your Cal Wellness Grants Portal account instead of the LOI application. Here you can access an in progress or previously submitted application. You can also transfer the application or email a copy of it to someone else. More details about this process can be found in the LOI application guide on our website.

So this is our new Grants Portal. We look forward to receiving your letters of interest and learning more about your organizations and programs. Should you have any questions, you can review the applying Q&As on the website for the LOI application guide. You can also call or email grants management and we'll be happy to help you.

Maricela Cueva: Thank you, Amy. The new Grants Portal is very exciting. While we're waiting for participants to submit more questions, let's start with the following question that we have here.

"Has the mission of Cal Wellness changed with the launch of this grant program?"

Judy Belk: Our mission has not changed in terms of our focus on promoting the health and wellness of underserved communities throughout the state. We are still a statewide funder, our focus is on health and wellness, and our focus is continued to be on underserved populations.

And as mentioned before, what also has not changed is this foundation's legacy and focus on being a responsive grantmaker, also a real commitment to understanding the importance of core support. And part of our tradition has been that 50 percent of our grant dollars are targeted for direct services, and that will continue. We view Advancing Wellness as really a continuation and an enhancement of our mission.

Maricela Cueva: "What does Cal Wellness mean by the phrase 'social determinates of health'?"

Fatima Angeles: Our strategic planning was really informed by a number of things including environmental scans, but also a review of our work in the past 14 years. What we found was we had been investing in changing and working on issues that are focused on the social determinates of health. So with Advancing Wellness, we are lifting up that priority.

And for us, the social determinates of health is really just an assertion that health is more than just a personal pursuit, and it is often impacted by external circumstances that create obstacles to achieving a healthy life. Simply put, where people live and work,

their race or ethnicity, and their income can impact their health and wellness. And so our desire is to help in some way to level the playing field so that everyone has access to good paying jobs, safe neighborhoods, and quality healthcare services.

Maricela Cueva: "Will you consider multi-year grants?"

Fatima Angeles: Yes, we will. We have always valued multi-year support. We believe that providing multi-year grants, in addition to providing core support, allows organizations to plan better and to build strength and some level of sustainability. So we will continue to provide multi-year grants.

Maricela Cueva: "If there's a better initiative fit for the LOI than what was first selected, will you reassign to a better initiative?"

Amy Scop: We do have a process in place for when you select a program area or portfolio to review your letter of interest. If a program director reviews it and decides this might fit with another area, yes, the program director will ask their fellow colleagues to review it as well.

Maricela Cueva: "Are there deadlines when submitting these requests?"

Amy Scop: We have an ongoing LOI application process. We do not have any deadlines when LOIs need to be submitted by.

Maricela Cueva: "Is the Opportunity Fund short term only?"

Fatima Angeles: No, it's not short term only, although we want the Opportunity Fund to be responsive and we're going to try to make it respond as quickly as we can, so we are really looking. Most of the grants under the Opportunity Fund will most likely be, especially around the promoting innovation piece, one-year grants.

But we will certainly consider multi-year grants for efforts such as building the capacity of both the philanthropic and non-profit sectors, as well as individual organizations. It depends on the project. But really what I encourage folks to send us new, exciting ideas that we can learn from and that we can help share our lessons with.

Maricela Cueva: "Can an organization apply for funding under more than one program?"

Amy Scop: While you can apply for more than one, it's not very likely that they would be considered for funding at the same time. So we encourage you to apply for one at a time.

Maricela Cueva: "What does Cal Wellness mean by the phrase 'health equity'?"

Fatima Angeles: When we think about the social determinates of health, we really are talking about health equity. And so during our strategic planning process, we look to the Center of Disease Control, we look to the World Health Organization to help us ground our thinking around the social determinates of health and health equity.

And for us, what we were thinking about in the front of our minds as we developed Advancing Wellness was that health equity to us means that every person has the opportunity to achieve optimal health regardless of his-or-her race or ethnicity, education level, gender identity, sexual orientation, employment, level of income, where they live, or the level of disability. And so that's how we view health equity and it's very much related to the social determinates of health. And we use that as a foundation for the development of the strategies that you see before you in Advancing Wellness.

Maricela Cueva: "Do you need to select one of your focus areas, or can several be selected?"

Amy Scop: When you apply online, you'll see that there's a dropdown menu of all the portfolios and any program areas within. You will only be able to select one. But again, as we mentioned earlier and is part of our efforts in being most responsive to our applicants and what Judy called the 'wellness approach', if you're request is reviewed by one program director and they believe that the request might fit better in another program area, they will definitely share that request with their fellow program director for your request to be reviewed again.

Maricela Cueva: "Is it possible to apply for one large grant that covers multiple areas?"

Fatima Angeles: In the past, we didn't do that often, but we are open to what you present. So, again, we don't normally do that. As most foundations, we have limited funds. But if you feel strongly that you are unable to select a particular program area, and you feel strongly that a comprehensive request is what you need, than send it to us. We'll definitely review it and have a conversation with you if we feel like it merits funding.

Maricela Cueva: "Will current grantees be requested to submit grant reports online?"

Amy Scop: The current grantees that receive grants during our Responsive Grantmaking program that is about to sunset will continue to report the way that they have been. New grantees going forward with our Advancing Wellness program, as they create their accounts online, they will receive their reports online and they will then be able to submit them online as well.

Maricela Cueva: "How would grantees or individuals submitting a grant know that they will be invited to submit a full proposal?"

Amy Scop: As part of our process, once we receive an LOI, the LOI's reviewed by program staff. Once the program director decides that they want to move the request forward for board review, they will receive another notification from the foundation asking them to submit a full proposal, and that full proposal will be submitted online as well.

Judy Belk: We cannot fund every LOI that comes in, but it might be helpful to just demystify the process, because it's a very thoughtful process on this end.

Fatima Angeles: Every request that is submitted to our online portal gets reviewed, read, vetted. We did that with our previous process where people mailed in their request, we do that with the online portal. So every request gets reviewed by one of our six grantmakers on staff.

If the program director gives it, 'Yes, I'm interested. We want to take a look at it even more closely' as Amy mentioned, we will send you an email request asking you to submit a full proposal online, and you will receive guidelines for what we need to see in that proposal packet, and you'll be able to type it in, attach information, everything that you want to communicate to us, you'll be able to do that through the online portal.

Once we receive it, we review every single proposal that comes through, including the attachments that are submitted. We then set up a site visit with the applicant. We go out, meet with the organization representatives at their place of work. We want to see where you are, we want to meet the people you work with. And we want to understand the issues you're working on, how you're doing the work, why you're doing the work.

And of course, we're also there so that you understand what we do at the foundation. We want to make sure that we are available and

we leave time during that site visit to answer any questions you may have.

We then take all of that information back. Our program directors take a look at what they have in front of them, and from the pool of proposals make a set of recommendations to Judy, our CEO, and to Fatima Angeles, Vice President of Programs, about the applications that they want to recommend to our board for approval. It is measuring the strategies that we have set in place and see where the applications fit in. And then we have a robust conversation with our grantmakers before we present it to our board for their consideration.

Judy Belk: We are continually looking at ways that we can continue to enhance our review process, and that will be a major focus in the coming years. The launch of the Grants Portal is one example of our customer service initiative as we do think of our community partners as our customers. We're hoping that this will be more efficient, will save you time, will save us time on this end.

Maricela Cueva: "Can an organization outside of California apply as long as the work is focused in California?"

Fatima Angeles: Yes, they can, but we want to emphasize that the focus of the work, the beneficiaries of the work, have to be the people of California.

Maricela Cueva: "Can multiple accounts be created for one organization?"

- Amy Scop: There's really no need for one organization to have multiple accounts, so if an organization feels for some reason that they should, I think having a conversation, giving us a call to discuss that, would be appropriate.
- Maricela Cueva: "Are you funding mental health services and substance abuse treatments?"
- Fatima Angeles: Those two important issues are not priorities of Advancing Wellness, and it wasn't a strong priority for us in the past, either. Having said that, our particular portfolio around education with Resilient Youth, we take a look at mental health services for Resilient Youth as we fund them, to help them succeed in their educational and technical professional goals.
- So we are looking to help support, for example, supportive housing programs for current and former foster youth so that they can feel supported as they get through school. That level of support can include group counseling, individual counseling, but again, with the goal of helping lift that young person and carry that young person through the post-secondary education process.
- Maricela Cueva: "Do you give priority to old grantees?"
- Fatima Angeles: No, although, of course, we value our previous grantees and our current grantees. And when I say 'no', I mean that it does not hurt you or help you that you've gotten a grant from the California Wellness Foundation before. So we treat every application as a new

application because we are a responsive grantmaker, and that the majority of the ideas that we support come from over the transom. So we do not prioritize previous grantees before, but we are always happy to see them come through our door again and again.

Maricela Cueva: "Do you plan to give more funding in certain areas in comparison to others?"

Fatima Angeles: If you take a look at the way our portfolios are set up, you'll notice that under our first portfolio, 'Bridging the Gaps In Access and Quality Care', there are more programs underneath that particular portfolio. And it's because that's where we felt the need was in terms of what this foundation wants to move into. And so that particular portfolio will have more dollars assigned to it than the other three.

Maricela Cueva: Can only existing grantees be allowed to make organizational development requests, or can new applicants request that as well?"

Fatima Angeles: New applicants can request that as well.

Maricela Cueva: "Do you need fiscal sponsor's information when you apply?"

Amy Scop: When you're applying and if you're an organization that works with a fiscal sponsor, the information at the LOI stage that is needed is from your organization and not from the fiscal sponsor entity. If at the time that a proposal's warranted and a program director requests that, we will gather additional information at that point.

- Maricela Cueva: "So would capital grants be considered under the Opportunity Fund?"
- Fatima Angeles: If capital grants means funding for brick and mortar building of facilities, the answer is no.
- Maricela Cueva: "Will you consider proposals from collaboratives?"
- Fatima Angeles: Absolutely.
- Maricela Cueva: "Do you fund policy efforts focused on one specific city or county?"
- Fatima Angeles: We can. We certainly can and we certainly have. Again, we want to support efforts that are put forth by grant seeking organizations, and if that is the focus of their policy work, we can certainly support that. Again, it has to be in alignment with our priorities, of course.
- Maricela Cueva: "How will Cal Wellness measure success?"
- Fatima Angeles: In addition to developing the strategies in our Advancing Wellness, a parallel effort was developed which resulted in evaluation framework that is meant to go along with Advancing Wellness. And this evaluation framework will not only allow us to measure our progress towards our goals, but it allows us to take a look at short-term and mid-term indicators that can help inform us whether or not we should adjust strategies or change bits and pieces of it so that we

can better map out our way to achieving our goals under the portfolios.

Maricela Cueva: "Is there a maximum or minimum grant size in different areas?"

Fatima Angeles: No, there isn't, although I will encourage applicants to take a look at our past grant amounts. As we learn or as we move, it is informed by what we see over the transom. But right now we are anticipating that our grant sizes are relatively close to the grants sizes that we had been making in past years.

Maricela Cueva: "Can you apply even if active grants are in place?"

Amy Scop: Yes, you can apply even if you have an active grant.

Fatima Angeles: You want to be able to plan for when you receive new grants, when you apply new grants, so that your programs and your services will continue. So certainly, if you have an existing grant, you know when it's going to end. You'd like to continue the work. So you want to submit a request about six months before your existing grant ends if you are trying to plan to not have a gap in funding for the work that your organization is doing.

We will be looking at it as an application just like any other applicant. So whether you're a current grantee, a former grantee, or a new grant seeker to the California Wellness Foundation, we'll review your application in the same manner.

Maricela Cueva: "Will you consider matching grants?"

Fatima Angeles: We can certainly consider that, and it's always great if folks can use our existing grant dollars to leverage additional funds for their work from other foundations or from other governmental entities. But I will say that sometimes the matching process from other institutions are not in alignment with our timeline, so it makes it very difficult for us to move in a timeframe that is for another institution. In the cases where they do align, absolutely; definitely use our dollars to leverage other funds. But it is often very difficult to align timelines.

Maricela Cueva: "What is the most common mistake you see in LOIs?"

Fatima Angeles: A missed opportunity is applying when you haven't read or understood clearly the goals and priorities of the foundation. And that's the truth for any grantmaking organization, not just this foundation.

It does still take time to fill out and to make sure that every field is completed. So before you do that, I encourage you to take a look at our website, read the guidelines, read the goals, and see if your work aligns with our priorities.

Maricela Cueva: "Will you consider capital improvement grants for major capacity building projects that overhaul technology infrastructure to expand data collection capability or capacity?"

Fatima Angeles: That's a difficult question to answer immediately. We would have to review the letter and see what the dollars going to be used for. We certainly understand the need for improved technology capacity, and so we'll definitely take a look at that. Most of the time, when we get capital requests, it's to help fundraise for the building of a building, and we tend not to do that. But supporting and expanding the extension of technology and other innovations within an organization, we can certainly review.

Maricela Cueva: Great, thank you. I want to thank everyone for joining us today. In the coming days, our recording of this webinar will be available on calwellness.org. If your question was not answered during the course of the webinar and you'd like to contact a member of the Cal Wellness staff, feel free to call the main line at (818) 702-1900. Also, staff email addresses are now on our website as well. And before we close, I wanted to have Judy who has a few closing remarks.

Judy Belk: Thank you, Maricela. I really just wanted to thank all of you who've participated in the webinar. In a way, you've been part of a historical milestone. This is the first webinar that the foundation has hosted. We'd love to hear from you if you have felt that it's been a productive way for us to communicate. We are constantly looking at a variety of ways to get the word out, to reach folks throughout the state.

One of the things that I've learned in my six months, this is a pretty big state and we want to use all of the tools in our communications

toolkit to reach out to you, so thank you so much. Just by the thoughtfulness in your questions, it's clear that as we move into this new chapter that we're going to be learning together, learning while giving, and we'll continue to reach out to you in the days ahead.

I also want to just thank folks who have been really important partners in today's webinar. These things don't happen by themselves. I especially want to thank our IT department, our communications staff, VPE Communications: Maricela and her team, and our program and grants managements staff. They, along with our finance team and others in the foundation, were really working hard to support your work.

And finally, on behalf of the board and the staff, we want to thank you for your patience. Your patience over the last year to give us the opportunity to pause for a moment, to really think about how we together can launch Advancing Wellness. Thank you so much.

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