

Community Economic Mobilization Initiative (CEMI)

YEAR 1 REPORT

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Informing Change

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Foundation



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Introduction

CEMI in Context

The COVID-19 pandemic exposed critical gaps in our public health system and infrastructure. Under-resourced communities were disproportionately impacted, and existing health and economic disparities were further exacerbated.

Exposing these disparities resulted in historic levels of investment from the federal government, approximately \$94 billion from the Infrastructure Investment and Jobs Act, American Rescue Plan, California Jobs First, and the Justice40 Initiative.*

With the level of one-time investments being made, The Center at Sierra Health Foundation (**The Center**) recognized the need to quickly implement a program to ensure community-based organizations were well-positioned to respond to the historic opportunity.

To advance inclusive and equitable economic development and support climate-resiliency, The Center launched the Community Economic Mobilization Initiative (**CEMI**) on April 27, 2022.

The initial investment was \$15 million, with the James Irvine Foundation providing \$14 million dollars and Sierra Health Foundation contributing \$1 million.**

The funder collaborative of foundations (**funding partners**) has grown to include Chan Zuckerberg Initiative, The California Endowment, The California Wellness Foundation, Blue Shield of California Foundation, and David and Lucile Packard Foundation.

* *The Justice40 Initiative establishes a federal government-wide goal that 40 percent of the overall benefits of certain Federal investments flow to disadvantaged communities that are marginalized, underserved, and overburdened by pollution. Justice40 designations are made at the census tract level using a [climate and economic justice screening tool](#).*

** *Sierra Health Foundation's Board of Directors approved \$1 million in 2023 over two years and an additional grant for \$1 million over two years in 2024. Sierra Health Foundation's total commitment to CEMI is \$3 million dollars as of October 2024.*

CEMI's Funding Structure



In total, CEMI is supported by 7 foundations (**funding partners**) & has resourced 45 organizations (**funded partners**). These funds were awarded through 2 distinct funds: the Pooled Fund and the Donor-Designated Fund.

The **Pooled Fund** leverages the collective funding power of multiple funding partners. It issued a request for proposals, which were reviewed by Center staff, who made grant selections and funded 22 organizations in CEMI's first year.

The **Donor-Designated Fund** was initially advised by the James Irvine Foundation and will also be advised by The California Endowment in CEMI's second year. Those foundations' staff provide funding recommendations, which are reviewed and approved by The Center staff. This fund resourced 23 organizations during CEMI's first year.

About CEMI's Evaluation

Pronounced “see me!” to acknowledge communities’ desire to be seen and considered, CEMI partners with a growing list of grantees (**funded partners**) who aim to put communities first. As a trailblazing nonprofit capacity-building effort, CEMI strengthens the ability of Black, Indigenous, and People of Color (BIPOC)-led and -serving organizations*, especially those rooted in communities that have been historically and intentionally excluded or discriminated against in California, to secure and influence the use of public funds for economic and environmental benefit.

The learning and evaluation component of CEMI is developmental and intended to inform improvements and adaptations to CEMI’s ongoing work. The Center believes that evaluation and learning play a role in ensuring proper stewardship of its resources. To that end, this evaluation aims to expand learning and enable CEMI to hold itself accountable for what it has set out to accomplish.

During the first year of CEMI, learning and evaluation activities focused on gathering feedback from funded partners through a survey and focus groups, an analysis of grant data, grant applications, and interviews with CEMI’s participants.

** This is defined as organizations in which people who identify as part of communities that experience discrimination based on race or ethnicity hold substantive decision-making positions and are at the heart of the organization’s mission. More about CEMI can be found at: <https://www.shfcenter.org/community-economic-mobilization-initiative>*



Evaluation Questions and Methods

Learning and Evaluation Questions

The learning and evaluation component of CEMI is exploring a set of questions over two years, including the following:

- To what extent are the core components of the CEMI framework implemented as intended? What is adapted and why?
- What types of organizations are funded through the initiative, and do funds reach communities most impacted by injustice and inequity?
- What changes are observed in funded partners' capacity, understanding, and access to new funding and development opportunities through participation in CEMI?
- To what extent is CEMI meeting its short-term outcomes? Do funded partners have increased access to public funding?



Data related to these questions was gathered in Year 1 and is explored primarily in this Year 1 report



Data related to these questions will be a focus of Year 2 and the final report

Year 1 Methods

Four methods (document review, survey, focus groups, and interviews) were used during the first year of learning and evaluation activities. In selecting and implementing these methods, we prioritized the following principles:

- **Learning:** The approach is developmental; the primary use of data is to inform learning and continuous adaptation.
- **Equity and Power:** The methods apply an equity lens, for instance, when exploring who received funds through CEMI and attending to issues of power dynamics in funding relationships. In some cases, we will look at single data points across all funded partners (such as dollars of public funding accessed), but our methods also leave room for funded partners to define success on their own terms.
- **Balanced Participation:** We have selected methods that create opportunities for partners to share their perspectives and experiences. However, this is not a fully participatory evaluation but instead takes a balanced approach that also seeks to limit the time burden placed on funded partners, as they have important work of their own to be getting on with!

Fall 2023

Grants Data and Applications Analysis (document review)

January 2024

Funded Partner Survey — 82% response rate

March 2024

Funded Partner Focus Groups (2 groups with 14 partners)

April 2024

Interviews with 4 Center staff and 5 Funding Partners



Guiding Frameworks

CEMI's Conceptual Framework

To realize inclusive economic development, community institutions representing underinvested neighborhoods and populations must be influential participants in local and regional economic development conversations. Historically, they have not often been at the table.

The CEMI Conceptual Framework (on the following page) outlines the goals, strategies, and expected outcomes of pursuing the change necessary to ensure that BIPOC-led and --serving community organizations are influential partners and decision-makers in economic development and that communities experience inclusive, equitable, and climate-resilient economic growth.

“CEMI helps to ensure communities can take advantage of public funds, but thinking past that, it is also to ensure that public resources are really able to be governed, dictated, and influenced by folks in local communities so that those funds can then improve local well-being, both in economic and in health terms.”

– FUNDING PARTNER

“CEMI is an investment to build regional capacity to address issues around creating economic opportunities for historically marginalized populations that require governmental, private, and nonprofit collaboration. It's intended to prepare our communities to bring in resources that historically haven't gotten to our neighborhoods.”

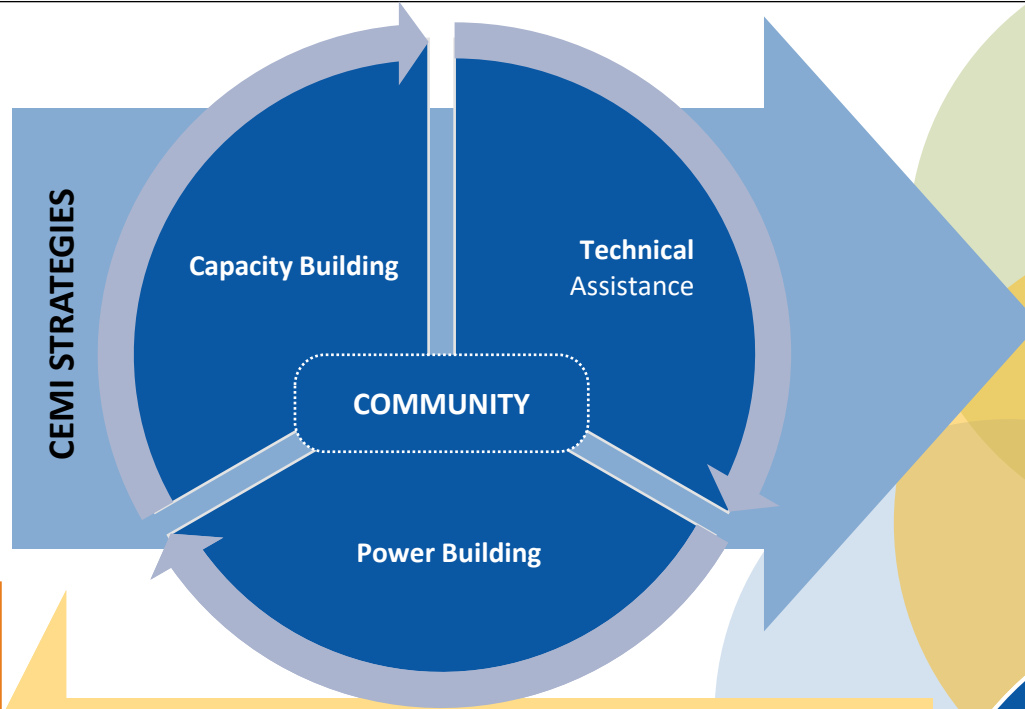
– FUNDED PARTNER



CURRENT CONTEXT

A large influx of state and federal investments for community development.

A history of community organizations, especially those led by and serving Black, Indigenous, and People of Color (BIPOC) communities, being left out of decision-making about community economic development (CED) and facing capacity barriers to accessing these funds.



CEMI COMMUNITY

- BIPOC-led and -serving organizations
- Technical assistance & power building partners
- Funding partners

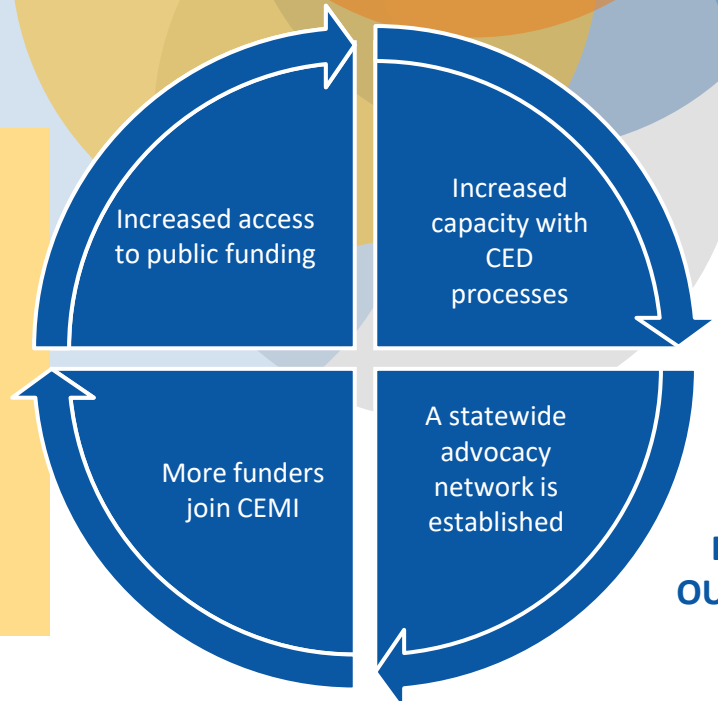
ULTIMATE GOALS

- BIPOC community organizations are influential partners and decision-makers in CED projects and processes.
- Communities experience inclusive, equitable, and climate-resilient economic growth.
- Opportunities for work and wealth generation in underinvested communities improve.
- Individual and community health and well-being improve.

New state and local policies and practices help to sustain BIPOC-led and -serving organizations' access to and work in CED planning and implementation.

Improved **collective capacity**, among government, funders, and organizations, to **address economic and employment disparities and inequities**.

RIPPLE EFFECT OUTCOMES



DIRECT OUTCOMES

Inclusive Economic Development

<p>INCLUSIVE ECONOMY</p> <p><i>Expand opportunities for more broadly shared prosperity, especially for those facing the greatest barriers to advancing their well-being.</i></p>	EQUITABLE	A. Upward mobility for all.
		B. Reduction of inequality.
		C. Equal access to public goods and ecosystem services.
	PARTICIPATORY	D. People are able to access and participate in markets as workers, consumers, and business owners.
		E. Market transparency and information symmetry.
		F. Widespread technology infrastructure for the betterment of all.
	GROWING	G. Increasing good job and work opportunity.
		H. Improving material well-being.
		I. Economic transformation for the betterment of all.
	SUSTAINABLE	J. Social and economic well-being is increasingly sustained over time.
		K. Greater investments in environmental health and reduced natural resource usage.
		L. Decision-making processes incorporate long-term costs.
	STABLE	M. Public and private confidence in the future and ability to predict outcome of economic decisions.
N. Members of society are able to invest in their future.		
O. Economic resilience to shocks and stresses		

The inclusive economic development framework is also a guiding framework for CEMI. It describes the critical components of an inclusive economy, and its authors have further developed the technical assistance strategy within CEMI so that all CEMI partners have a shared understanding of what it means to work toward inclusive community economic development.

From: Benner and Pastor et al (2016)
Inclusive Economy Indicators: Framework & Indicator Recommendations



CEMI's Year 1 Activities



Characteristics of the Funded Partners



Overview

Through two granting structures, the Donor-Designated Fund and a Pooled Fund, The Center had granted \$14,045,000 to 45 organizations for the Community Economic Mobilization Initiative as of December 2023. (In May 2024, The California Endowment added \$762,746 to the Donor-Designated Fund. That funding will be included in the Year 2 report.) More than 80% of all funded partners were funded the full amount they requested. Some (5) are working with fiscal sponsors to organize and distribute the grant, and some Donor-Designated Fund partners (5) intend to re-grant the money to other organizations.

	POOLED FUND	DONOR-DESIGNATED FUND	TOTAL
NUMBER OF GRANT PARTNERS	22	23	45
TOTAL GRANT AMOUNT	\$4,045,000	\$10,000,000	\$14,045,000
MEDIAN GRANT AMOUNT	\$200,000	\$250,000	\$200,000
MODE GRANT AMOUNT	\$200,000	\$250,000	\$200,000
RANGE OF GRANT AMOUNTS	\$150,000–\$220,000	\$75,000–\$2,000,000	\$75,000–\$2,000,000

Funded Partners' Organization Location and Reach

CEMI-funded partners work locally in 42 different counties in California and on statewide issues. As determined by the Climate and Economic Justice Screening Tool, **60% of all funded partners are headquartered in a disadvantaged Census tract (a Justice40 tract).*** Communities in these Justice40 tracts experience some of the greatest negative impacts of climate change and pollution while also having the least access to energy, health, housing, transportation, water and wastewater, and workforce development services.

Reviewing their programmatic activities, we determined that **84% of all funded partners reach populations in a disadvantaged Census tract (Justice40 tract).** Pooled Fund partners are likelier to be located and working in these communities than Donor-Designated Fund partners, suggesting The Center staff are especially adept at identifying or prioritizing these organizations.

Additionally, the application data show that funded partners work in urban and rural parts of the state. 41% reported working in rural and urban areas, and 36% and 23% of Pooled Fund partners work in urban or rural areas, respectively.

EXHIBIT 1
Address of Funded Partners' Organization Within Disadvantaged Census Tracts (n=45)

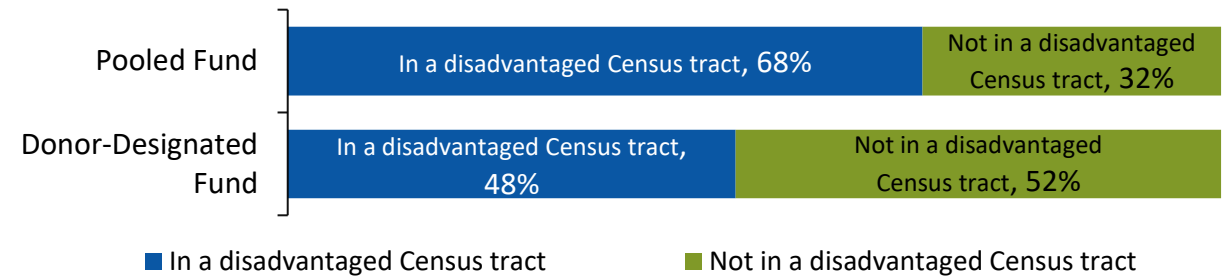
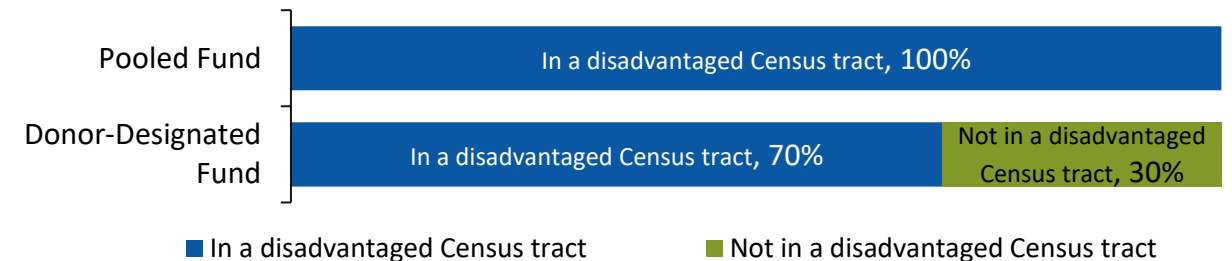


EXHIBIT 2
Reach of Funded Partners Work in Disadvantaged Census Tracts (n=45)



* The term "disadvantaged" is used to maintain consistency with Justice40 nomenclature. These communities are affected by historic and ongoing discrimination and underinvestment.

Funded Partners' Leadership and Community Focus

97%* of funded partners define themselves as Black, Indigenous, and People of Color or BIPOC-led and -serving organizations. The Center defines this as organizations in which people who identify as being part of communities that experience discrimination based on race or ethnicity hold substantive decision-making positions and are at the heart of the organization's mission. Those partners who do not define themselves this way serve many different communities or serve mostly white communities in very rural counties.

Funded partners also apply equity and diversity principles to the ways in which they do their work. When asked to describe what being BIPOC-led and -serving means to them, funded partners provided both demographic and practice descriptions. The latter includes collective decision-making, valuing lived experience alongside professional experience, and utilizing an equity lens in their programs.

A sample of reflections on what it means for their organization to be "BIPOC-led and -serving":

"All decision-making roles and leadership roles are held by staff members that experience discrimination based on race or ethnicity."

"Our mission is to end mass incarceration. Serving those who experience discrimination based on race or ethnicity is at the heart of our mission, as we know that racial and ethnic discrimination is the root cause of mass incarceration."

"We believe solutions are best designed by those closest to the problems, so our services are designed and informed by the people we serve."

"We are committed to a model of organizing and advocacy that leans into "radical inclusion," a practice ensuring that directly impacted communities, leaders, and organizations co-own our work and come together to debate, design, and struggle collaboratively to determine the best path."

* As self-reported via the funded partner survey (n=37).



How Funded Partners Advance Inclusive Economic Development

Coalitions and Collaborations

Almost half of all funded partners, 47% (21), have reported joining one of nine different California Jobs First Collaboratives.

Segmented further, about 52% (12) of Donor-Designated Funded partners and 31% (7) of Pooled Fund partners, are involved in these collaboratives. The collaboratives aim to streamline economic and workforce projects throughout the state.

Beyond the collaboratives, **95% of Pooled Fund partners and 30% of Donor-Designated Funded partners reported working in coalition** with other organizations in their region to complete their CEMI work.* Partners report already working in coalition with past partners and hope to create more connections through their involvement in a regional collaborative and CEMI.

FUNDED PARTNERS ARE INVOLVED IN THESE CALIFORNIA JOBS FIRST COLLABORATIVES:**

- Bay Area California Jobs First
- Kern California Jobs First Coalition
- Northern San Joaquin Valley California Jobs First
- Sacramento Region California Jobs First
- Southern California Region California Jobs First
- Regions Rise Together (Salinas and Monterey Counties California Jobs First collaborative)
- The Uplift Central Coast Collaborative (6-County Central Coast Region)
- California Jobs First High Road Transition Collaborative for the Central San Joaquin Valley
- Inland Empire California Jobs First Collaborative

** Differences in the application format may be the reason for this large variation. Pooled Fund partners were asked to describe how they would work in partnership with others explicitly while Irvine-designated partners were not. This means that only Irvine-designated partners that described being part of or leading a coalition unprompted as part of a general statement about their work are counted here.*

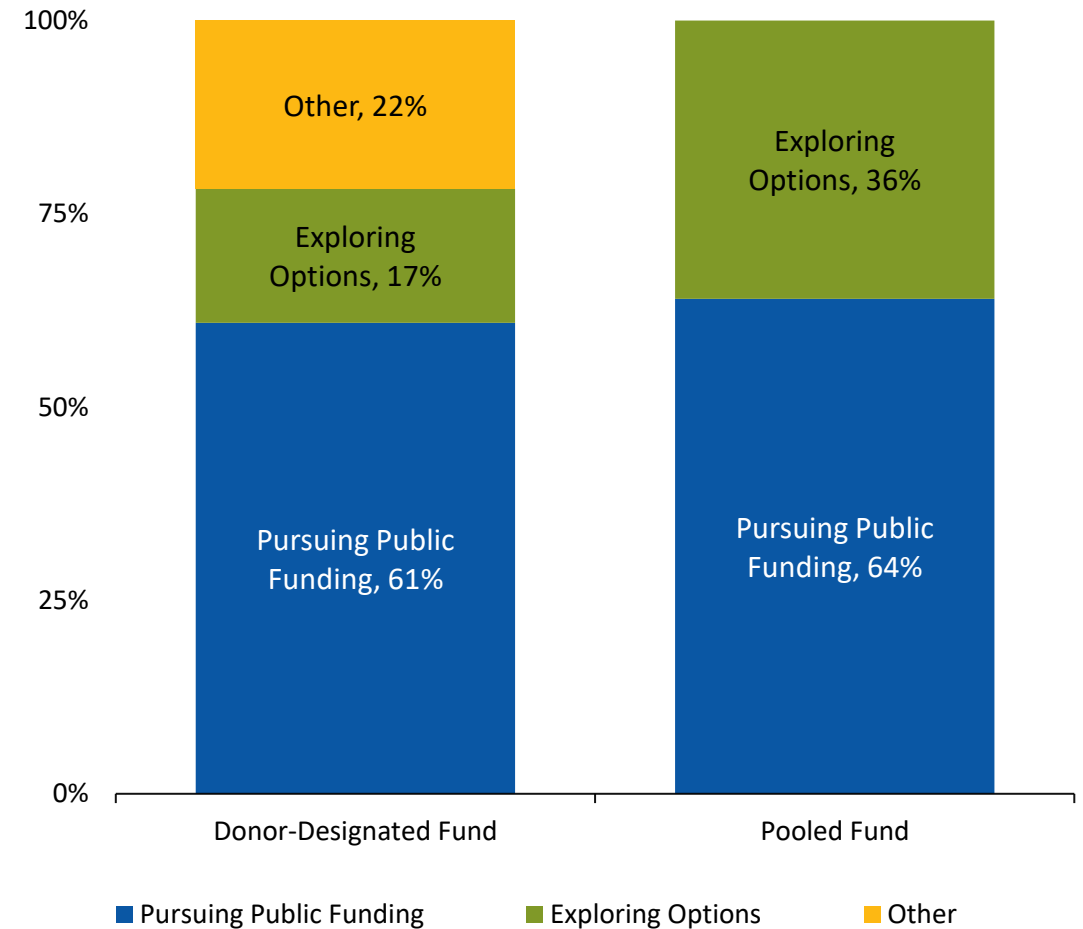
*** CA Jobs First, formerly the Community Economic Resilience Fund (CERF), was created to provide regional communities in California with funding for economic development projects aimed at establishing high-quality jobs, improving equity, and supporting economic diversification for a climate-resilient economy. California's counties were divided into 13 economic regions.*

Pursuing Public Funding

Nearly two-thirds of all funded partners are already **pursuing public funding**. Those not actively pursuing it as of early 2024 were **exploring ways to engage with public funding** by assessing which opportunities are right for them, hiring staff to assess the landscape and eventually steer the process of applying for funding, and engaging in work related to developing partnerships or conceptualizing program designs in support of future potential funding. Donor-Designated Fund partners not pursuing or exploring public funding (the “Other” category at right) provide technical assistance to other organizations.

Some are joining a California Jobs First collaborative to begin collectively pursuing funding sources. Other public funding sources Pooled Fund partners named include the American Recovery Plan (**ARPA**), CA Dept of Public Health, US Dept of Labor, the CA Strategic Growth Council, Covid Workplace Outreach Project (**CWOP**) Funds, American Rescue Plan Good Job Challenge (Orange County collaborative proposal), and State Opioid Settlement Allocations.

EXHIBIT 3
Funded Partners & Public Funding
(n=45)

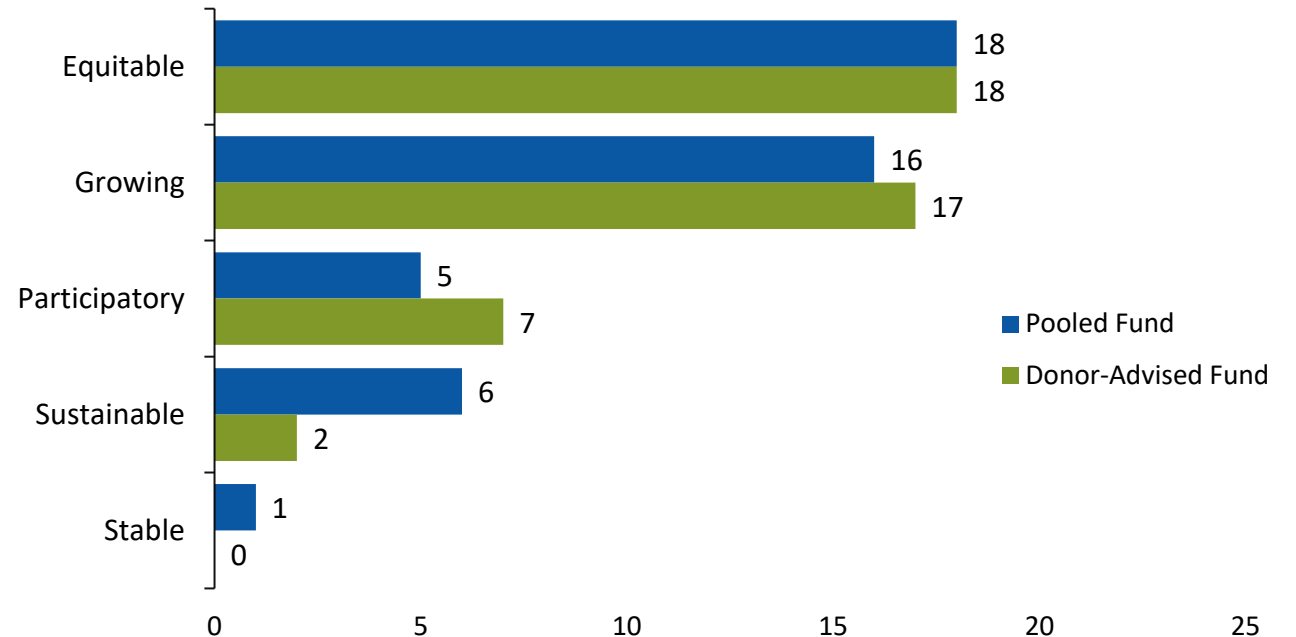


Focus of Partner Activities

We categorized the aims of funded partners using the Benner/Pastor categories. Both Pooled Fund and Donor-Designated Funded partners are focused on **growing** their local economy and creating more **equitable** communities.*

The funded partners vary in their emphasis on **sustainability**, with the Pooled Funded partners having a stronger focus. One Pooled Fund partner emphasized the need for stable and sustainable growth in anticipation of environmental and economic shocks due to the Salton Sea environmental crisis.**

EXHIBIT 4
Funded Partners' Project Narratives Categorized by Benner/Pastor Categories (n=45)



* One application may have multiple categories.

** The Salton Sea is a saline lake formed from deliberate and accidental diversions of water from the Colorado River for agricultural purposes in the first half of the 20th century. After 1999, the lake began to shrink as local agriculture used less water. Winds over the exposed lakebed sent clouds of toxic dust into nearby communities.

What CEMI Work-in-Progress Looks Like in Partners' Own Words*

“We’re influencing and leveraging bigger pots of federal funding going to businesses. For example, the CHIPS Act gives multi-billion-dollar grants to manufacturing companies. We’re trying to hold those companies accountable for workforce development plans. Are they making commitments to labor standards? Who are they working with regarding equity in the workforce? And, how can we make that real and shift what this looks like on the ground?”

“The flexibility [of the CEMI grant] has allowed us to look at new ways to impact our community. One of the things we’ve been able to move forward is policy advocacy; we’re hiring someone in DC to champion our community’s needs and advocate for those things. That wouldn’t be possible without the financial resources we’re getting from CEMI.”

“We’ve been able to use CEMI as a resource to bring education, critical thinking, and technical assistance to the larger High Road Training Partnership (HRTC). We have 600 California Jobs First Coalition members. We bring information and practices to advance equity to the LA County group to ensure that the work we do with whatever resources we get is also done within an equitable framework.”

“We’re working on the policy relationships needed to develop our neighborhood. It will be a green cultural zone as a part of an initiative to green the streets and help support cleaning up that area. That’s also involved us working with different partners in the city and mobilizing our community to get this up and running. It’s a new project, its infrastructure, and we’re kind of just building it from the ground up right now.”

* As shared by funded partners in focus groups.



Insights and Opportunities



Experiences of CEMI in Year 1 from the Perspectives of Funded Partners, Staff, and Funding Partners

Overview

In the following section, we report on how CEMI staff, funding partners, and funded partners have experienced the initiative's first year of implementation.

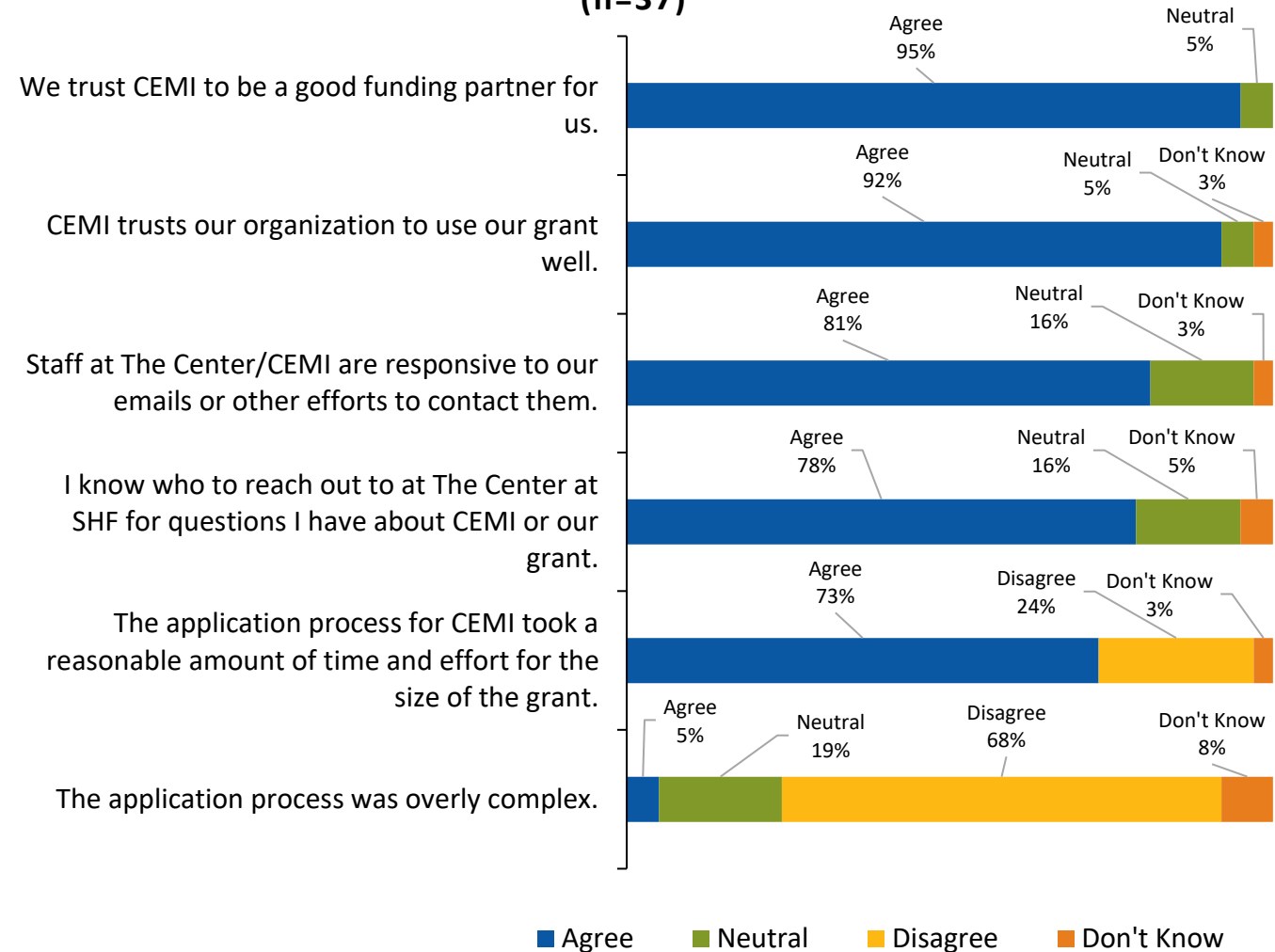
Most report a **positive experience with** CEMI to date. A strong theme across all sources was that **the way in which CEMI has been implemented strongly aligns with the values articulated by The Center**. This alignment is shown by funded partners' relationship with CEMI (responsive, trust-based), how staff designed CEMI, and the shared understanding among CEMI's funding partners of the critical link between economic opportunity and health.

CEMI staff, funded partners, and funding partners can also identify and highlight learnings from their CEMI experiences. These learnings offer insights into the challenges that CEMI partners grapple with and opportunities to leverage in the future.

Funded Partner Experience*

- Funded partners report **CEMI's application process was reasonable and proportional** to the size of the grant.
- Funded partners **felt they could contact** The Center for support and expect a response.
- Funded partners **trust CEMI** to be a good funder, and in turn, **feel trusted to use their grant well.**
- When asked how they felt about managing public funding, approximately half of funded partner respondents (15) used positive words like **confident, capable, stewardship, and motivated**, and half (14) used negative words like **ill-equipped, anxious, concerned, and frustrated.***

EXHIBIT 5
Funded Partner Experience Survey
(n=37)



* From January 2024 survey of 37 organizations.

Funded Partner Experience*

Funded partners state that they have felt valued as a partner in CEMI when...

- The Center staff **proactively responded to communications** (both reaching out for one-on-one conversations and responding swiftly when partners had questions).
- TARC **developed technical assistance plans** with partners' input.
- The Center and TARC hosted events that **connected partners with one another** to share ideas.

“The CEMI staff has personally called and spoken to our team regarding our challenges and needs. They have also done a great job integrating our feedback into the program design.”

“Every staff member at The Center has been kind and supportive.”

“The CEMI team listens to learn, and it shows.”

“They went out of their way to answer questions.”

“A CEMI team member contacted me regarding a topic I'd asked about. The topic hadn't been addressed at the convening, so she offered to pull together grantees for a Zoom conversation.”

“TARC strongly considered our own organizational development goals in implementing technical assistance strategies.”

Funded Partner Experiences*

Two-thirds of funded partner survey respondents **did not name any challenges** of working with CEMI and The Center. The other respondents named the following challenges:

- Three partners said the guidance or information they received from CEMI was **confusing or unclear** in some way.
- Three partners reported **delays in receiving responses** to their questions or requests.
- Three partners said they **lacked the time or capacity to fully participate** in CEMI activities.

“I honestly can't think of any challenging experiences.”

“The expectations going into the grant weren't totally clear, and the amount of work expected to participate in learning tracks and cohort meetings is significant.”

“Some delay in getting responses to administrative questions related to grant expenditures.”

“One of the challenges was getting late notice for convenings, and the outcomes and benefit of convening have not always been compelling or clear.”

“It was a confusing start; we didn't know all the services available or how to tap into resources.”

“Making significant demands on our organization's time (often on short notice) pulls us away from the work in our community.”

* From January 2024 survey and April 2024 focus groups.

Staff Experience: Designing and Implementing the Program*

CEMI was designed in response to historic trends and the demands of the COVID-19 pandemic to help build partners' internal capacity. In particular, the pandemic highlighted some common barriers that prevent community-based organizations (CBOs) from applying for public funds to perform work necessary for serving their communities. The Black Child Legacy Campaign model inspired staff as they developed CEMI. This model emphasizes community-driven movement-building and prioritizing those most impacted.

“The same folks whom COVID has disproportionately impacted were also living in low-income communities. To lean into our mission, vision, and values as a grantmaker in health, we needed to ensure that we were paying attention to equitable economic recovery. We brought those intentionalities to the design”

“Being a small foundation, for the [SHF] Board to commit \$2 million to this effort is remarkable. It means they understand the urgency ... it speaks volumes of their trust in the team.”

Staff feel CEMI is being successfully implemented and can identify learnings to incorporate moving forward. For instance, if the program started today, staff say they would take more time to set and communicate clear expectations for partner participation upfront. They also reflected that CEMI may have selected organizations that were likely to be successful and wondered about a design that includes a wider range of organizations. Finally, they learned that the initial timeline was too tight in some cases, especially considering how long it takes to build relationships and coalitions.

* From interviews with 4 staff at The Center.

Staff Experience: Looking to the Future*

For the next year of work, staff are eager to develop CEMI's focus on power-building and advocacy, which they hope can have a longer-term impact. This aspect of the program has been slower to start, but there is potential for power-building efforts to increase CBOs' access to public funds.

Some staff expressed concern that CEMI's work may not remain a priority for funding partners. One challenge for CEMI is maintaining the momentum around investing in the work once it is no longer top of mind by promoting the program's rationale of connecting health to economic well-being.

“I think that will represent the next phase of our work: convincing those who may not necessarily see the tie between health and housing, health and transit-oriented development, or health and environment. That is going to be the next phase. But the first [funding partners] who come on board, they got it.”

“In my conversation with many nonprofits who do all kinds of work in communities, usually around health and human services, whether it's criminal justice reform or harm reduction efforts, one of the things they want people to be engaged in is a productive activity, often talked about in the form of a job. If we're going to make this pivot, we have to be able to support the nonprofits who do that incredibly important work to understand how to attach to that, this notion around economic opportunity.”

* From interviews with 4 staff at The Center.

Funding Partner Experience: Successes*

Funding partners were largely aligned with CEMI's approach. They especially appreciate that CEMI takes an integrated approach and understands the strong connections between health and economic well-being. They also believe CEMI's underlying values align with those of their organizations or programmatic roles. Funding partners view CEMI's approach as appropriate to the context of California and share The Center's understanding of the root causes of inequities.

“The Pooled Fund and staff resources were critical to fill an immediate need.”

Funding partners also recognize CEMI's ambition and were excited to see its bold vision begin to pay off as the program attracted interest from organizations serving populations or geographic locations of interest and high need. Some expressed the belief that the program is already having positive effects.

“That sense of ambition has been really impressive and exciting.”

“I think it's been doing great. CEMI has been doing great work.”

“It seemed like they did have a lot of groups working in many of the underserved parts of the state. My impression is that they've done a good job getting applications and interest from not just the major metropolitan regions.”

Finally, funding partners overwhelmingly expressed trust and positivity toward The Center itself, which they viewed as a competent and high-quality organization with a strong history of good work. They also expressed great admiration for the staff involved with CEMI in particular.

** From 5 interviews conducted with CEMI funding partners.*

Funding Partner Experience: Challenges*

Funding partners also named some challenges and opportunities for CEMI, such as:

- **Making the case for the whole cost and the related substantial investments needed to continue building out the infrastructure of community-driven work**, especially outside of major metropolitan areas.

“We have to have more honest conversations on what it takes to do this work, including the emotional, financial, and human resources needed, and especially about what it takes for smaller organizations to do this work.”

- **Attracting funding over the long term when some funding partners see the approach CEMI takes as tied to a particular moment in time (pandemic recovery).**

“I do feel that before we start building new capacity and infrastructure for CEMI, I think some threshold questions need to be asked. Does CEMI support a function and purpose both today and in future?”

“Right now, state and local governments are facing big deficits. The foundation world is also facing the same, so getting greater funding will be a little more challenging in the next couple of years.”

- **Expanding staff capacity at The Center.**

“Number one, I think Kendra [the CEMI Managing Director] needs more help.”

“This is going back to the overall capacity of Sierra Health Foundation ... It seems they are still operating under an old staffing structure... it is causing concerns, and I'm hoping they can stabilize that piece soon.”

* From 5 interviews conducted with CEMI funding partners.

Funding Partner Experience: Recommendations

Pooled Fund funding partners experience their engagement with CEMI as limited or low-touch. In one instance, this was perceived positively. However, in several other instances, funding partners wished for more communication and opportunities to learn about and from the work that CEMI is supporting.

“I think the funder engagement has been a little light. I don't necessarily see that as a bad thing. It's not like there hasn't been communication. But other pooled funds also bring together funders to regularly reflect.”

“I feel like I've been a little disconnected ... I think they could probably do a better job of maybe quarterly or every six months doing a funder briefing.”

A couple of funding partners speculated about the challenges of sharing out learnings about a project as complex as CEMI, which could take many years to show effects. Effective narratives around the program will be one key to demonstrating the program's value.

“In the future, how might these themes be extended and shared? And in what ways can stakeholders that play a significant role be involved and supported to understand and really sit with these themes?”

“When we talk about relationships, advocacy, narrative, matter. I think the whole narrative around the California Funders for Boys and Men of Color** is so strong and compelling. It would be great to see that for CEMI.”

* From 5 interviews conducted with CEMI funding partners.

** California Funders for Boys and Men of Color was another program of The Center.



Learnings and Recommendations



Considerations for CEMI Year 2

From the evaluation, we (Informing Change) draw the following statements about what has been learned and where the opportunities for continuous improvement.

1. CEMI's implementation is largely going according to plan, with some adaptations to the advocacy strategy to better leverage existing expertise in power-building and advocacy among funded partners. Most significantly, the implementation of CEMI is happening in a way that is true to the values of The Center and CEMI. Partners observe trust in how the funds have been granted and appreciate the responsiveness of staff at The Center.
2. CEMI is successfully reaching the communities it set out to prioritize, including Justice40 communities and BIPOC-led and -serving organizations. A higher percentage of funded partners than anticipated have some prior experience accessing public funding. Partners of the Pooled Fund are less likely to have this experience, suggesting that one of The Center's strengths as an intermediary funder is its capacity to identify and fund organizations with less access to public resources.
3. Partners value the content of technical assistance but have suggestions for improving how it is delivered. In Year 2 of the evaluation, we (Informing Change) want to improve our efforts and align more carefully with the TARC so that our evaluative efforts can better include their perspectives on what is working and what is being learned from implementing technical assistance programming.

Considerations for CEMI Year 2, Continued

4. CEMI funding partners value the approach and feel strategically aligned with CEMI's goals and values. We recommend creating a few more opportunities for them to learn about and connect with the work and its outcomes, as they also value the potential for CEMI to be a learning space for funders of community economic development.
5. CEMI was created to leverage a once-in-a-generation window of opportunity in which an unprecedented financial investment (federal monies) flowed to California. Despite this window's immediacy and time-bound nature, funded partners and CEMI staff have a long-term lens on the work. From this perspective, CEMI is critical to a broader, longer-lasting shift that moves decision-making power to communities. We recommend uplifting this long-term perspective more in communications about CEMI with current and prospective funding partners to better align with funded partners' visions for the work.

“Even after the planning and implementation process, somebody has to hold people accountable to what we say we will do in the High Roads jobs process. It is the community that's going to make sure that those things are happening. It's the community that needs to be rallying local voices to create equitable community benefits agreements. And if we're not funding long-term, these one-time dollars will flame out, and I worry that the planning will be for nothing.”

– FUNDED PARTNER



Acknowledgments

This report was prepared by:

- Michael Arnold, Rebekah Blume, Ayenna Cagaanan, and Caitlin Stanton at Informing Change. The project team also included Xiong Lee.

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- AAPI Equity Alliance
- Anti-Recidivism Coalition
- Blue Shield Foundation of Northern California
- California Association for Microenterprise Opportunity
- California Endowment
- CA Healthy Nail Salon Collaborative
- California Heritage Indigenous Research Project
- California Wellness Foundation
- Central Valley Community Foundation
- Chan-Zuckerberg Initiative
- CIELO – Community for Innovation, Entrepreneurship, Leadership and Opportunities
- Community Development Technologies Center
- Flintridge Center
- Friendship House Association of American Indians
- Irvine Foundation
- La Familia Counseling Center
- San Joaquin Community Foundation
- Utility Reform Network
- West Fresno Family Resource Center
- Working Partnerships USA



Appendix

Appendix A: Funded Partners

POOLED FUND

- 4th Second
- AAPI Equity Alliance
- Alianza Coachella Valley
- CA Healthy Nail Salon Collaborative
- California Association for Microenterprise Opportunity
- California Heritage: Indigenous Research Project
- CIELO - Community for Innovation, Entrepreneurship, Leadership & Opportunities
- City Heights Community Development Corporation
- City Heights Community Development Corporation
- Comite Civico Del Valle, Inc.
- Community Development Technologies Center
- Council on American-Islamic Relations
- Dolores Huerta Foundation
- Friendship House Association of American Indians
- Imperial Valley Equity and Justice Coalition
- La Familia Counseling Center, Inc.
- Líderes Campesinas
- Nevada-Sierra Connecting Point Public Authority
- Oroville Southside Community Improvement Association
- Roots Community Health Center
- Stanislaus Equity Partners
- United Way California Capital Region
- Utility Reform Network
- West Fresno Health Care Coalition (dba: West Fresno Family Resource Center)

DONOR-DESIGNATED FUND

- Action Council of Monterey County, Inc.
- California Calls for Education Fund (Million Voter Project)
- Central Valley Community Foundation
- Chaffey College Foundation
- Chinese Progressive Association
- Community Foundation of San Joaquin
- Flintridge Center
- Inland Empire Black Worker Center (COPE)
- Inland Empire Community Foundation
- Inland Empire Labor Institute
- Jewish Vocational & Career Counseling Service (JVS)
- LAUNCH (Foundation for California Community Colleges)
- Los Angeles Black Worker Center (Southern California Black Worker Hub for Regional Organizing)
- Los Angeles Brotherhood Crusade, Black United Fund, Inc.
- North Bay Jobs with Justice
- Pilipino Workers Center of Southern California
- Small Business Majority Foundation, Inc.
- Taller San Jose Hope Builders
- The Anti-Recidivism Coalition
- The Regents of the University of California (UC Berkeley Labor Center)
- The Regents of the University of California, Merced
- Visión y Compromiso
- Working Partnerships USA

Appendix B: Previously Shared Briefs

The following briefs were shared with The Center at Sierra Health Foundation for internal use only:

1. Grants Data Analysis Summary (January 2024)
2. Funded Partner Survey Analysis Summary (April 2024)
3. Qualitative Analysis Summary (May 2024)



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