

HISTORY OF INITIAL ADMINISTRATIVE AND ANNUAL PROGRAM ACTIVITIES BY FISCAL YEAR

1998-1999

- In September 1998, the Pajaro Valley Community Health Trust (Trust) was established with assets from the sale of Watsonville Community Hospital. Staff consisted of the CEO, Executive Assistant and an Accounting Manager.
- The Trust CEO facilitated the transfer of a California Endowment planning grant to establish a diabetes education program from Watsonville Hospital to the shared control of the Trust and the Public Health Institute. (This program became known as the Diabetes Health Center/DHC).
- By November 1998, a specially-appointed Blue Ribbon Committee of community leaders completed the selection of a diverse 23-member Board of Directors to govern the Trust. The Board was installed in January 1999.
- In January 1999, the Trust provided operating space and supervision for the DHC, which was staffed by one full-time RN/Diabetes Educator.
- In March 1999, the Trust Board approved its bylaws and established initial Board Committees (Executive, Finance, Nominating & Bylaws).
- In May 1999, The Trust Board established the Phil Rather Award for Leadership in Health Care as a major annual recognition event. Mr. Rather was the first recipient of the award named in his honor.

1999-2000

- In July 1999, the Trust Board held its first Board and Staff organizational retreat to develop its mission and vision statements, and its initial major operating policies and procedures.
- In July 1999, the Trust Board authorized the addition of a part-time Program Assistant at the DHC.
- In March 2000, the Trust established the Grants Review Committee and authorized the creation of a Program and Grants Manager position.
- In April 2000, the Trust formally assumed operation of the DHC in order to strengthen the infrastructure of this unique bilingual/bicultural diabetes education program. Operating the DHC also enabled the Trust to provide direct support to the community in a manner consistent with the mission and goals of the Trust.
- In April 2000, the Trust also:
 - Established the Trust Website
 - Met with Ann Monroe of the California Health Care Foundation for advice on establishing an appropriate and responsible inaugural grantmaking program for the Trust.
- In June 2000, the Trust authorized the establishment of a position for the Director for the DHC.
- The Trust provided DHC financial support of \$88,707 for diabetes education and services in the community.

2000-2001

- In October 2000, the Trust held its first “How to Apply for a Grant” workshop to assist nonprofit organizations in applying to the Trust for grant support.
- In December 2000, the Trust held its first Development Committee meeting.
- The Trust provided DHC financial support of \$132,324.
- In January 2001, the Trust distributed **\$100,000** in grants to community health care organizations (inaugural grant cycle) for projects focused on one-time costs for health care capital needs and capacity building.

2001-2002

- In September 2001, the Trust Board and Staff held its first facilitated Strategic Planning Retreat to determine the foundation’s strategic program and grantmaking focus for 2002-2005. The Board approved four focus areas: diabetes, oral health, child and adolescent health and the health of farm workers and their families.
- October 2001, the Trust funded the initial planning meetings to convene a Regional Diabetes Collaborative.
- In November 2001, the Trust received a grant of \$238,000 from The California Endowment to help develop and implement strategic plans for board education, staff development, communications and fundraising.
- In January 2002, the Trust engaged a consultant to develop the Trust’s first communications plan, including a logo, slogan, branding images, and a publications schedule.
- In February 2002, the Trust hired its first fund development staff member to oversee annual giving and special events.
- In May 2002, the board implemented its first fund development strategic plan.
- The Trust provided DHC financial support of \$180,588.
- In June 2002, the Trust distributed **\$145,000** in grant funding to community organizations addressing one or more of the foundation's strategic program areas.
 - *Health Insurance/Coverage & Education on Using the System: (\$30,000)*
 - *Oral Health: Prevention & Access: (\$50,000)*
 - *Promoting Entry & Advancement in the Health Professions: (\$20,000)*
 - *Miscellaneous: (\$45,000)*

2002-2003

- In July 2002, the Trust initiated its first Board/Staff annual giving program.
- In August 2002, the Trust Board adopted its first Board Training and Development Plan, focusing on governance, board and staff roles and fiduciary duties.
- In September 2002, the Trust formally launched the ***Regional Diabetes Collaborative (RDC)*** to convene health and social service organizations for the purpose of supporting, promoting and coordinating diabetes efforts in the Tri-County region (Monterey, San Benito and Santa Cruz). The Trust also committed to providing ongoing administrative support for the RDC as a program of the Trust.

- In January 2003, the Trust CEO began serving on the Steering Committee of the Healthy Kids Collaborative, a county-wide initiative to provide health care coverage for all children in Santa Cruz County.
- In March 2003, the Trust Board authorized the hiring of a part-time Registered Dietitian/Diabetes Educator to address a 30% increase in demand for services at the DHC.
- In May 2003, the Trust CEO began serving on the Board of the Health Improvement Partnership (HIP) of Santa Cruz County.
- In June 2003, the Trust received its first three-year core-operating grant for the Diabetes Health Center from the California Wellness Foundation in the amount of \$150K.
- The Trust provided DHC financial support of \$221,891.
- The Trust provided RDC financial support of \$17,000
- In June 2003, the Trust distributed **\$119,000** in grant funding to community organizations addressing one or more of the foundation's strategic program areas.
 - *Health Insurance Coverage/ Education on Using the System: (\$20,000)*
 - *Oral Health: Prevention & Access: (\$40,000)*
 - *Promoting Entry & Advancement in the Health Professions: (\$48,000)*
 - *Miscellaneous: (\$11,000)*

2003-2004

- In January 2004, Trust/RDC representatives traveled to Washington D.C. to represent Santa Cruz County diabetes collaborative partners at the prestigious Institute of Medicine Conference, and to showcase our community-based approach to improving the quality of care for persons with diabetes.
- In February 2004, the DHC achieved recognition from the American Diabetes Association (ADA) as an excellent quality program. This designation entitles the DHC to bill Medicare for services to its elderly patients.
- In May 2004, the Trust and RDC hosted the first annual Diabetes Forum and Health Fair.
- The Trust provided DHC financial support of \$240,185.
- The Trust provided RDC financial support of \$48,916
- In June 2004, the Trust distributed **\$167,499** in grant funding to community organizations addressing one or more of the foundation's strategic program areas.
 - *Diabetes & Contributing Factors (\$46,500)*
 - *Health Insurance Coverage/ Education on Using the System: (\$40,000)*
 - *Oral Health: Prevention & Access (\$55,499)*
 - *Promoting Entry & Advancement in the Health Professions: (\$24,500)*
 - *Miscellaneous: (\$1,000)*

2004–2005

- In September 2004, the Trust was awarded a federal grant from the Agency on Health Care Research & Quality in the amount of \$1.3 million. The grant was to be disbursed from September 2004 through September 2007 to establish a community-wide diabetes registry. The project became known as the Community Chronic Care Network (CCCN) of Santa Cruz County.
- In March 2005, the Trust held its second Program Strategic Planning Retreat. The focus of the retreat was to: review and evaluate accomplishments, lessons learned and the impact of the Trust's grantmaking and program activities over the previous four years; and to consider the best use for the Trust's time and resources over the next five years, through 2010.
- The Trust provided DHC financial support of \$280,616.
- The Trust provided RDC financial support of \$44,000.
- In June 2005, the Trust distributed **\$137,499** in grant funding to community organizations addressing one or more of the foundation's strategic program areas.
 - *Diabetes & Contributing Factors: (\$65,500)*
 - *Health Insurance/Coverage & Education on Using the System: (\$20,000)*
 - *Oral Health: Prevention & Access (\$25,499)*
 - *Promoting Entry & Advancement in the Health Professions: (\$23,500)*
 - *Miscellaneous: (\$3,000)*

2005–2006

- The Trust and the DHC were recognized as 2006 organizations of the year by the Pajaro Valley Chamber of Commerce.
- The Trust provided DHC financial support of \$277,025.
- The Trust provided RDC financial support of \$44,560.
- In June 2006, the Trust distributed **\$150,000** in grant funding to community organizations addressing one or more of the foundation's strategic program areas.
 - *Diabetes & Contributing Factors (\$60,780)*
 - *Health Insurance/Coverage & Education on Using the System (\$33,000)*
 - *Oral Health: Prevention & Access (\$33,220)*
 - *Promoting Entry & Advancement in the Health Professions (\$20,000)*
 - *Miscellaneous (\$3,000)*

2006–2007

- In October 2006, The Diabetes Health Center received its second three-year core-operating grant from the California Wellness Foundation for \$255,000.
- In March 2007, the Trust created the ***Wellness at Work Program***, focused on improving eating habits and increasing physical activity among Trust employees.
- In the spring of 2007, the Trust contracted with Applied Survey Research to conduct an oversample of the Community Assessment Project (CAP) among Pajaro Valley residents in order to gain a more comprehensive view of the quality of life in the Pajaro Valley.

- The Trust provided DHC financial support of \$335,000.
- The Trust provided RDC financial support of \$40,117.
- In June 2007, the Trust distributed **\$150,000** in grant funding to community organizations addressing one or more of the foundation's strategic program areas.
 - *Diabetes & Contributing Factors (\$75,000)*
 - *Health Insurance/Coverage & Education on Using the System (\$28,000)*
 - *Oral Health: Prevention & Access (\$30,000)*
 - *Promoting Entry & Advancement in the Health Professions (\$14,000)*
 - *Miscellaneous (\$3,000)*
- In June 2007, the Board of Directors approved a new Trust Employee Wellness at Work Policy. This policy encourages employees to incorporate physical activity into the workday and sets nutrition standards for food served at Trust sponsored meetings and events.

2007-2008

- In July 2007, the Trust convened a group of oral health stakeholders. This group evolved into the ***Regional Oral Health Collaborative***.
- In November 2007, the Community Assessment Project data (based on an oversample of Pajaro Valley residents) was released. The Trust issued a report on the findings from the survey oversample, in which the responses of PV residents were compared with those of other Santa Cruz County residents: *A Glimpse of Reality: Health and Other Disparities in the Pajaro Valley*.
- In December 2007, the Trust partnered with Dientes Community Dental Care, Salud Para La Gente, and private dentists from the Monterey Bay Dental Society to implement the ***Dental Affinity Program***. The goal of the Dental Affinity Program (DAP) is to help connect low-income uninsured adults with access to quality, affordable dental care through a collaboration with local dentists to provide pro bono dental care.
- In December 2007, the CCCN/Diabetes Registry grant ended. The goal of the research project was to determine whether a community-wide diabetes registry shared by multiple users in divergent settings could be implemented within three years under the proposed methodology. By the end of the grant period, the project team had concluded that the diabetes registry could not be implemented as proposed. While several factors contributed to this outcome, the primary challenge for the project were limitations in the software development and the shift in partner interest from developing the registry tool to planning and implementing electronic medical records systems among providers. However, the grant/project was considered a success because it provided a great opportunity for learning and collaboration within the health community, built new relationships and strengthened ties between health care providers.
- In January 2008, the Board of Directors approved a new ***Grant Making Budget Policy and Calculation Formula***. This methodology will be used to determine the budget for grantmaking funds available each year. The new formula will be applied for the first time in the 2008-2009 budget process.

- In March 2008, the Trust Board approved the addition of 1 FTE Dietitian to the staff of the DHC to help meet the increase in demand for Medical Nutrition Therapy related to the dramatic rise (from 2% of patients in FY 02-03 to 24% of patients in FY 07-08) in the number of patients under age 20 with a diagnosis of overweight, obesity, high blood pressure and high cholesterol.
- The Trust provided DHC financial support of approximately \$353,799(Unaudited).
- The Trust provided RDC financial support of approximately \$40,000 (Unaudited).
- In June 2008, the Trust distributed **\$150,000** in grant funding to community organizations addressing one or more of the foundation's strategic program areas.
 - *Diabetes & Contributing Factors (\$65,000)*
 - *Health Insurance/Coverage & Education on Using the System (\$28,000)*
 - *Oral Health: Prevention & Access (\$40,000)*
 - *Promoting Entry & Advancement in the Health Professions (\$14,000)*
 - *Miscellaneous (\$3,000)*

Other Highlights:

- **Phil Rather Award Recipients:**
 - 1999 Phil Rather
 - 2000 DiCicco Family
 - 2001 Dr. Janet Bell
 - 2002 Bonnie Gutierrez
 - 2003 Jorge Sanchez & Watsonville Hospital Service League
 - 2004 Salud Para La Gente
 - 2005 Ed & Doris Mann & Hospice Caring Project of SCC
 - 2006 Mary Boyd & Central Coast Alliance for Health
 - 2007 Dr. George Wolfe & Youth Resource Bank of SCC
 - 2008 Kathleen Kilpatrick & Healthy Kids Coalition of SCC
- Diabetes Forums & Health Fairs: Held annually from 2004 - 2008
- **Involvement with Collaboratives –**
 - Human Care Alliance – Since 2002
 - Healthy Kids – Since 2003
 - Nutrition Fitness Collaborative – Since 2003
 - Health Improvement Partnership/Safety Net Coalition – Since 2003
 - Go for Health – Since 2004
 - Tobacco Education Coalition – Since 2004
- Trust Annual Reports have been published annually from 2003-2007
- HealthWatch (the Trust's newsletter to the community) has been published twice per year beginning in Winter 2001 through Spring 2008.

Support to the Community -

*Total grants made by the Trust from 1998- 2008:	\$1,118,998
**Total DHC program support provided by the Trust 1998-2008:	\$2,110,135
**Total RDC program support provided by the Trust 2003- 2008:	<u>\$ 234,593</u>

Total support to the community 1998-2008: \$3,463,726

*The amount of funding in this total was reduced by \$60,748 due to returned grant funding.

**A portion of this support for the DHC and RDC comes from external grant and sponsor funding solicited annually by Trust staff.

*** From September 1998-June 2008, the Trust has brought \$ 2,181,714 in private and public grant funding into the community.