

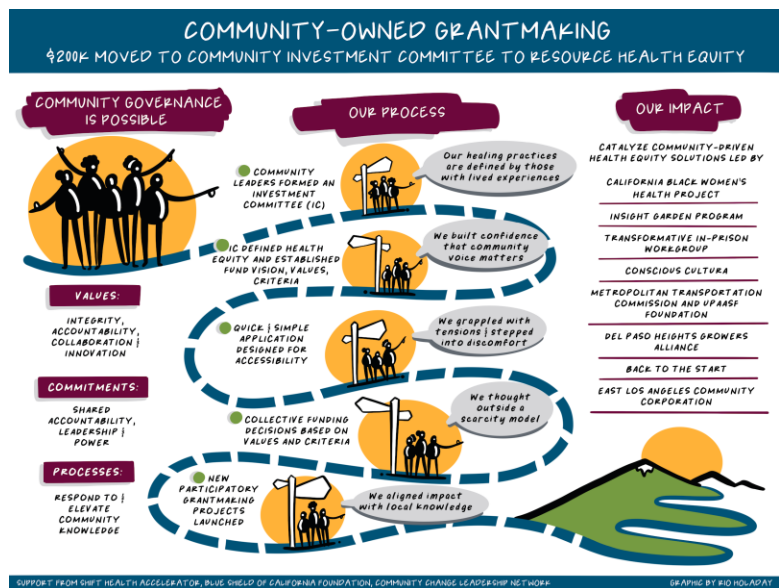
## Shift Health Accelerator's Health System Participatory Investing Initiative

[Shift Health Accelerator](#) (Shift) is a national network of multidisciplinary leaders committed to community-led change as a pathway to accelerate health and racial equity. Shift supports grassroots community leaders advance their vision of health, tests participatory funding to shift resource decisions into the hands of communities, and advances creative institution-community partnerships that center shared power and governance. Shift was launched because we believe that critical resources are too often out of reach of community leaders organizing locally to advance health equity.

Over the past three years, a global pandemic and national reckoning on racial equity have unavoidably underscored the disproportionate burden of health inequities carried by BIPOC and low-income communities. Against this backdrop, institutions across the healthcare sector have named commitments to racial and economic justice in the communities they serve. However, there is a significant gap in centering direct community leadership and decision-making to operationalize these equity actions. Healthcare institutions and other private/public actors that fund drivers of health such as food systems, transportation, and housing must grapple with the reality that equity is realized not just through *what* gets funded, but *how*. To ensure true power-shifting and address root causes of health inequities, we must invest in truly participatory, community-led processes.

Participatory approaches to healthcare-related funds are rare -- some health-focused foundations and health systems may engage in participatory grantmaking, but these dollars are a small sliver of the total dollars available within healthcare. Many health systems, payors, funders, and other healthcare institutions possess sizable investment portfolios. While some of these institutions are shifting what they invest in (i.e. ESG), they typically lack a community-based accountability mechanism. Oftentimes, the dollars are going into place-based efforts, focused on the social determinants of health, and yet community members have little say in directing those resources. Taking a holistic view of the potential healthcare-related funds that can be directed by community-driven participatory models stands to shift the sector by creating proof points across a diverse array of institutional resources. Tools and examples are needed to bolster the field of institutional commitments and partnerships toward health equity.

Shift's Collaborative Fund participatory grantmaking model



**Shift is launching a new initiative specifically focused on building those proof points. This initiative will:**

- Develop and test a participatory investing model for healthcare institutional investing;
- Identify and lift up examples of this work for deepening equitable healthcare investing;
- Develop tools for participatory investing by the health sector; and,
- Amplify lessons and stories from this work for sector leadership.

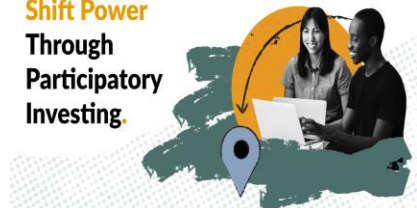
Specifically, we are crafting a cohort of healthcare institutions that are interested in a community-driven investing

model to participate in a learning and testing cohort on new approaches to community-owned resources as well as taking action steps to test these approaches with institutional resources. We are looking for healthcare leaders to participate in this initiative.

#### Are you a healthcare leader who:

- Is deeply curious and committed to new ways of embodying your institutional equity commitments?
- Have decision-making authority over institutional investment resources?
- Have interest in exploring new ways of approaching those resources through shared power with communities?

#### Shift Power Through Participatory Investing.



Shift sourced community leader advisors and investments for Common Future's philanthropic participatory investing initiative.

We offer a space that is both safe and thought-provoking, aiming to hold ourselves and our colleagues accountable to our shared commitments to equity.

#### Program requirements:

- **Participation in initiative events:** We anticipate the timeline for this initiative to run March 2024 - August 2025. The initiative will consist of 2 in-person meetings, monthly network gatherings, and additional 1:1 support for action testing.
- **Resourcing participatory investing project:** Participants must commit institutional buy-in and investment capital, as well as capacity building support for community leadership. We are seeking participants interested in experimenting with participatory approaches for investment capital (or equivalent in institutional assets) in the range of \$200K – \$1M. Shift will also offer matching support for institutions to provide stipends for community governance. We will discuss specifics with individuals interested in joining the program to ensure that work leads to tangible tests of change with institutional resources dedicated to community decision-making.
- **Technical assistance fee:** Shift's design, expert convening, and facilitation to run the cohort network and 1:1 TA.
- **Participation in field building opportunities:** We want these examples to influence others in further testing participatory investing and we will share stories and learnings with the field.

#### Anticipated benefits for health system participants:

- Improved health outcomes and understanding of need guided by those with lived experience
- Access to expert community health equity leaders to inform institutional equity commitments
- Access to Shift expertise, tools, and insights on participatory community governance
- Convening and learning network space with aligned health system leaders
- Opportunities to experiment at the leading edge of healthcare equity efforts nationwide

The initiative, funded by The California Wellness Foundation, builds on Shift's successful Clinic model, several participatory funding initiatives, including advising on this [Participatory Investing Toolkit](#), produced by Common Future. This effort also furthers Shift's efforts to accelerate [healthcare accountability](#) through institutional commitments to community governance and ownership aim to create sector standards for healthcare commitments to equity. Shift sources experts from our network of Robert Wood Johnson Foundation [Culture of Health Leaders](#) to bring expertise that extends to colleagues addressing structural determinants of health to center community wisdom. Check out our [Impact Report](#)!

Are you interested in participating? Get in touch with [Jen Lewis-Walden](#), [Sonia Sarkar](#), [Lisa Richardson](#), and [Zachary Travis](#) from Shift's Leadership Team.