



DISCOVERY REPORT

NOVEMBER 2025



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EXECUTIVE SUMMARY

In August 2025, the Desert Healthcare District (DHCD) retained Sowen Consulting, a social impact consultancy, to co-design a comprehensive five-year strategic plan (FY2027-2031) and a long-term roadmap to guide the District and Foundation's future. This strategic collaboration aims to establish a True North for the DHCD and ensure that it is best positioned to achieve its mission of "achieving optimal health at all stages of life for all District residents" while evolving its role as a community leader in the short and long term.

The objective is to strengthen DHCD's role as an organization that embodies the key characteristics of a successful healthcare district. One that has a **clear and community-driven vision and mission** focused on community health outcomes. One that demonstrates **strong strategic and financial discipline**. One that creates **robust partnerships** with key external stakeholders. One that is structured to allow for **flexible and sustainable funding**. One that is founded on a **data-informed strategy**. One that is **equity-centered**, where DOH **are embedded** at every step and historically marginalized voices are included.

DHCD's leadership and Sowen recognize that the organization is entering a pivotal chapter. Since its founding in 1948, the Desert Healthcare District has played an increasingly vital and broad role in meeting the growing healthcare needs of the Coachella Valley. The 2024 lease and purchase agreement with Tenet Health ushered in a new era of opportunity, positioning DHCD to become the largest funder in the region and a catalyst for collective impact. In fact, the new agreement "provides for lease and purchase installments over the 30-year period totalling nearly \$650M with the first installment of \$100M due May 31, 2027. As healthcare districts across California continue to evolve from direct service delivery to systems-level change, DHCD's transformation will serve as a model for how public health institutions can adapt, lead, and sustain meaningful community outcomes. This strategic planning process marks a defining moment for DHCD. With the right strategy in place, the District is poised to not only deepen its local impact but also set a statewide precedent for how healthcare districts can lead with purpose, equity, and long-term sustainability.

To achieve these objectives, Sowen proposed a five-phased, iterative approach that allows for the gradual integration of key findings, insights, stakeholder voices, and actionable recommendations. Each phase examines the organization from five perspectives- culture, knowledge, people, process, and tools- and builds on the previous phase, ensuring that the final strategy is holistic, data-informed, and grounded in lived experience. This context-sensitive approach will ensure that the new strategic plan reflects the evolving needs and dynamics of a modern, sustainable healthcare district, both today and in the years ahead.



Strategic planning is the disciplined practice of making intentional choices that define who an organization is, what it seeks to achieve, and the impact it aims to create. It is both a reflection on the present and a projection into the future—an opportunity to assess a changing environment, envision what lies ahead, and align mission, strengths, and resources accordingly. At its core, the process asks three essential questions: *Where are we today? Where do we want to be tomorrow? And what deliberate actions will move us forward?*

This report presents the findings of the Discovery Phase, conducted between August and October 2025, and aims to answer “where is the DHCD today?” We embarked on the Discovery process with a beginner’s mind, guided by the principle that “You can’t know where you’re going until you know where you are.” This phase focused on developing a comprehensive understanding of DHCD’s current strategic and financial position—its strengths, challenges, and opportunities—and provides the foundation for the design of the FY 2027–2031 Strategic Plan. The outputs of this Discovery phase are actionable, data-driven insights that provide a roadmap for developing a successful, flexible, measurable, strategic, and financially sustainable plan.

Before we dive in, let us say **CONGRATULATIONS!** Our initial analysis and exploration indicate that DHCD is widely regarded as a trusted convener and strategic funder—one that empowers partner organizations and amplifies collaboration. The organization is seen by stakeholders as dedicated and deeply mission-driven, and as playing a central role in advancing a culture of reflection, responsiveness, and impact. Overall, the DCHC stands on a strong strategic foundation. It’s led by talented and dedicated leadership, staff, and Board. This presents the organization with clear opportunities for organizational optimization and accelerated impact. The key is to harness and focus these strengths with relentless intention and commitment.

It is important to note that this report is not intended to sit on someone’s desk or in their inbox. It is intended to be a foundational document for the activities, ideation, and efforts the DCHD Board, Executive Leadership, and Staff will undertake in the development of the FY 2027-2031 Strategy.

We recommend three ways to use this report:

- If pressed for time, read the “Executive Summary” and “Key Takeaways & Actionable Recommendations” sections.
- For a snapshot of the DHCD’s key strengths and opportunities that will guide the upcoming strategic planning, turn to the SWOT analysis
- Read it in its entirety to have a detailed understanding of all of the insights and supporting data points.

KEY THEMES & ACTIONABLE RECOMMENDATIONS

01

Reaffirming and Refining DHCD's Vision & Mission

DHCD's vision and mission remain meaningful and relevant, but should be reaffirmed by key stakeholders to ensure full alignment and future relevance.

Recommendation:

Conduct a True North workshop with the Board and leadership team to ensure clarity, cohesion, and focus.

02

Define District and Foundation Roles to Reflect New Paradigm

The lack of clear differentiation between the District and Foundation roles needs to be addressed to strengthen organizational alignment and unlock new collaboration and funding opportunities.

Recommendation:

Conduct a workshop to finalize the role and responsibilities of both the District and the Foundation to clearly articulate how the two entities complement one another in advancing community health and optimize financial opportunities for the short and long term.

03

Refining Focus and Strengthening Strategic Alignment

DHCD's strategic plan provides a strong foundation but requires greater focus, definition, measurability, and distinction between goals, strategies and activities to effectively guide decision-making and resource allocation.

Recommendation:

Prioritize and clarify strategic pillars, goals, and activities. Define measurable outcomes, and adopt a SMART framework to strengthen accountability and impact.

04

Thoughtful Integration of DOH Approaches into Planning & Design

A focused approach to the DOH will help the organization align its equity goals with its True North and track measurable community outcomes.

Recommendation:

Develop a shared understanding of the DOH, select a framework and integrate it intentionally into all aspects of planning and impact evaluation.

05

Leveraging Data-Driven Insights

DHCD's current data systems and culture need to be optimized to ensure decisions and funding are consistently guided by robust, timely and actionable evidence.

Recommendation:

Build a SMART goal dashboard, formalize data processes and roles, and strengthen partnerships to enhance evidence-based decision-making and impact measurement.

06

Building an Internal Culture of Collaboration

As DHCD grows it is imperative to foster a culture of collaboration to improve communication, trust, and cohesion amongst key internal stakeholders.

Recommendation:

Embed collaboration opportunities into strategic planning and governance through joint workshops, inclusive processes, and open communication.

07

Centering Community Voices

Initial efforts to embed community input can be more systematic to make DHCD's strategy more equitable, data-informed, and responsive to local needs.

Recommendation:

Build on Data Walk initiatives to create ongoing engagement structures to gather, apply, and communicate community insights through strategic planning and beyond.

08

Amplifying Collaboration Among Partners

As a trusted community leader, DHCD can strengthen its role as a thought leader in collective impact by deepening collaboration amongst external stakeholders across the Coachella Valley.

Recommendation:

Act as a collaboration catalyst, connecting grantees, facilitating knowledge-sharing amongst external stakeholders and promoting joint problem-solving.

09

Growing Brand Recognition

DHCD brand awareness is currently low. Raising awareness of DHCD's mission and impact will build trust, visibility, and stronger community connections.

Recommendation:

Expand outreach through visible community programs and a strategic communications plan that reinforces DHCD's leadership and local presence.

10

Optimizing and Streamlining Grantmaking

DHCD's well established grantmaking process can be further optimized through clearer strategic focus and structure.

Recommendation:

Use SMART goals and Data Walk insights to clarify priorities, enhance transparency, and ensure measurable community impact.

11

Strengthening Impact Measurement

DHCD's current impact measurement framework is poised for improvement and expansion to improve data consistency, usability, and real-time learning.

Recommendation:

Refine RBA tools to measure the impact of the new strategic plan with a focus on outcomes.

12

Accelerating Impact with Technology

DHCD has some tech tools in place but fuller integration and adoption will enable the organization to better leverage these systems and prepare for future innovation.

Recommendation:

Conduct a technology stack audit, develop a phased roadmap to strengthen data systems, and establish an AI task force to assess literacy and explore responsible applications.

13

Preparing the Organization for Sustainable Growth

Growth potential is clear, but operational systems, staffing capacity, and processes must evolve to match expanding grantmaking and funding levels.

Recommendation:

Consider the implementation of RGS HR Assessment Report recommendations #8 & #11, Invest in internal capacity, strengthen cross-team processes and implement a focused talent strategy to sustain responsible growth.

14

Embedding Financial Strategy for Sustainable Growth

Incoming Tenet Lease funds present both opportunity and responsibility to plan strategically across the short, medium and long term to sustain growth and impact.

Recommendation:

Integrate a clear financial pillar into the new strategy to guide resource allocation, investment strategy, and organizational capacity.

METHODOLOGY

In this foundational stage of strategic inquiry, Sowen employed a mixed-methods approach that allowed us to examine the DHCD organization from multiple and complementary perspectives through quantitative and qualitative analysis. Our goal was to ensure that our findings and recommendations were grounded in a deep understanding of DHCD as to be both meaningful and actionable.

Guiding all our efforts and activities in this Discovery process were Sowen's Areas of Assessment. While none of these areas are mutually exclusive, diving deep into each perspective and answering the questions outlined below allowed us to identify barriers, challenges, and opportunities.



CULTURE

Creation of a collaborative, cohesive, culture that prioritizes innovation and insight-driven decision making.

- Does the organization have and promote a collaborative, open, insight-driven culture?
- How are decisions made and translated from strategy to action?
- Are all parts of the organization aligned behind a clear vision and mission?



KNOWLEDGE

Levels of data and technical literacy, awareness, decision-making, and knowledge-sharing.

- Are there any clear knowledge gaps in critical areas of work or parts of the organization?
- Does information flow and is it used to make insight-driven decisions effectively?
- Does the organization have access to the data it needs to make optimal decisions?



PEOPLE

Role definitions and levels of expertise, experience, and enablement of the organisation's human capital.

- Does the organization have the right people, with the right skills, in the right places and are they enabled and empowered to do their jobs?
- Is the organization set up to attract and retain strong talent?
- Are people within and outside the organization collaborating effectively?



PROCESS

Creation and application of clear, sensible, insight-driven processes that are meaningfully adopted.

- Do the right processes exist in critical parts of the organization?
- Are processes known to critical individuals and are they being effectively adopted?
- What can be done to improve the processes, their adoption, or both?



TOOLS

Identification, integration, and adoption of meaningful tools that drive collaboration, efficiency and effective results.

- Do stakeholders have the tools they need to do their jobs effectively?
- Are there tools that we have, but are not using correctly or effectively?
- Are there tools that are needed but are not currently available?

Below is a snapshot of the activities we engaged in during the Discovery process.

Activity	Date	Format
Sowen/DHCD Check Ins with Executive Leadership	Bi-Weekly from Aug - Oct	Virtual
CVEP Meeting	Aug 6th	Virtual
Sowen/Staff Worksessions	Aug 14th, Aug 28th	Virtual
Staff Retreat MosCow Prioritization Exercise Collection Period	Aug 14th-Aug 25th	Asynchronous
Survey Collection Period	Sep 8th - Sep 22nd	Asynchronous
Sowen/Board Worksessions	Sep 18th, Oct 7th	Virtual & In Person
Community Partner Visits	Oct 6th	In Person
Staff & Board Current Strategic Plan MosCow Prioritization Exercise Collection Period	Sep 18th - Oct 3rd	Asynchronous

1. Board and Staff Worksessions and Discovery Conversations

Two work sessions were conducted with DHCD staff and Board members, respectively. The first session served as a strategic litmus test to assess alignment around the District's current mission and vision, define a shared vision of success, and evaluate progress under the current strategic plan. The second session focused on Stakeholder mapping. A stakeholder exercise was deployed to identify key stakeholders, their needs, fears, and the potential impact of the new strategic plan. In addition to these work sessions, Sowen met on a bi-weekly basis with Executive Leadership, Meghan, and different staff to track progress on the project, evaluate past strategic efforts, and better understand key processes, such as the RBA framework.

2. Organizational and Partner Surveys

Sowen designed, deployed, and analyzed three organizational surveys. Individual surveys were developed for the Board, staff, and community partners to gather diverse perspectives and quantitative insights. Each survey was designed to align with the five key areas of assessment, ensuring consistency across stakeholder groups while capturing their unique roles and experiences with the District. The majority of questions used a 1–7 Likert scale to measure levels of agreement and confidence, complemented by open-ended qualitative questions at the end to capture more nuanced feedback and context. The Likert scale was converted to relative confidence percentages on a 0-100 scale. The partner survey was distributed in both English and Spanish to promote accessibility and inclusivity across the Coachella Valley’s multilingual community. Chris Christensen distributed the Board and Staff survey, while the Partner survey was distributed to DHCD’s Constant Contact list. We received responses from all 7 Board members (30 questions asked + 3 open ended), all 12 staff (35 questions asked + 3 open ended), and 26 partners (25 questions asked + 6 open ended). In the Staff survey analysis, we define long-tenured employees as those who have worked at DHCD for 5+ years, whereas short-tenured employees have worked at DHCD between 0-5 years. In the Board survey analysis, we define long-tenured Board members as serving for 3+ years, whereas short-tenured Board members have served for under 3 years.

3. Landscape Analysis

A comprehensive document review was conducted to establish a baseline understanding of DHCD’s current operations, priorities, and impact areas. This included all publicly available DHCD materials relevant to the Discovery process, as well as internal documents shared with us, such as grant data and Data Walk processes. In addition, we reviewed external reports and assessments, including: Huron Report, CVEP Report, HARC Community Health Survey, and DHCD’s 2020 CNHA. To complement the document review, a PESTLE analysis was conducted to examine regional and contextual trends influencing DHCD operations and the communities they serve, drawing on data from (but not limited to) UCLA’s CHIS, the CDC, Academic reports, and local news sources.

4. MosCow Prioritization Exercise

Two MoSCoW prioritization exercises were used to test alignment and sharpen strategic focus. The first—run with staff early in the engagement—leveraged a Staff Retreat worksheet of initiatives to surface initial alignment and top-line priorities. The second—conducted jointly with staff and the Board—assessed the current strategic plan across three lenses: (1) MoSCoW category, (2) degree of advancement, and (3) community impact. The latter two were rated on a 1–5 Likert scale, then normalized to 0–100 confidence levels to enable comparison. Twelve participants (the full Board and senior leadership) completed the exercise. Both rounds also captured anonymous qualitative comments, adding context and nuance to the numeric results.

5. Community Engagement

Centering community voices in Discovery was a top priority to ground our understanding of DHCD's role and the needs of residents. We began by joining a CVEP online convening to observe how DHCD gathers feedback and tracks emerging issues. We then fielded a partner survey to capture input from organizations across the Valley. Finally, during Soven's first site visit, we held five in-depth meetings—with the Latino Commission, CVAG, OneFuture Coachella Valley, Angel View, and Jewish Family Service (JFS)—to surface qualitative insights on community needs, partnership dynamics, and opportunities to inform the development of the new strategic plan.



CURRENT STRATEGIC PLAN REVIEW

To deeply understand the current Strategic Plan, Sowen reviewed the current 2021-2026 Strategic Plan, engaged in a series of listening sessions with DCHD Staff and Board, and designed asynchronous exercises to answer the following key questions:

- How was the current strategy developed?
- What is working with the current strategy?
- What can be improved?
- What current strategic initiatives should be carried forward?

This exploration gave us the foundation to shape the 2027–2031 Strategic Plan, surface stakeholder perspectives on current objectives and initiatives, and highlight opportunities to scale what’s working rather than reinvent the wheel.

The current strategic plan was approved by DHCD/F Board on October 26, 2021. On November 4, 2023, the Board held a strategic planning retreat to evaluate the "retention of the current goals and strategies" and potential changes to priorities. In the "Retreat Slide Deck", reasons for prioritization were outlined as follows:

- DHCD/F has limited resources
- Don't want to diffuse resources and reduce impact.

Furthermore, the criteria used for this prioritization exercise were as follows:

- Magnitude of need by District residents
- Extent to which improving the issue enhances equitability of healthcare
- Degree of impact DHCD/F can achieve through its funding support
- Timeliness of achieving progress and fit with DHCD/F's Mission, vision, and capabilities

The following voting process was implemented:

- For all 7 goals, each strategy was evaluated on each of the criteria
- Each retreat participant voted on the extent to which the criteria would be met by the strategy (High/Moderate/Low)
- An aggregate priority rating for each strategy (High/Moderate/Low) across the criteria was determined and can be sorted into three categories:
- The updated 2021-2026 DHCD/F Strategic Plan revisions were approved on December 13, 2023. For the Discovery process, Sowen followed these previously established definitions:

Goal- an outcome to be achieved over a 5-year period

- Describes what DHCD/F is going to achieve through the implementation of strategies

Strategy- an action to be taken in support of accomplishing the goal

- A statement of how DHCD/F will accomplish the goal
- Strategies are stated for a 3-year period and can be refined annually

INTERNAL**Goal 1**

Proactively increase the financial resources DHCD/F can apply to support community health needs

Goal 4

Proactively measure and evaluate the impact of DHCD/F-funded programs and services on the health of community residents

HIGH-PRIORITY**Goal 2**

Proactively expand community access to primary and specialty care services

Goal 3

Proactively expand community access to behavioral/mental health services

Goal 6 (6.1 & 6.2)

Be responsive to and supportive of selected community initiatives that enhance the environment in the District's service area

NON-PRIORITY**Goal 5**

Be responsive to and supportive of selected community initiatives that enhance the economic stability of the District residents (on a situational basis)

Goal 7

Be responsive to and supportive of selected community initiatives that enhance the general health education of the District's residents

Goal 6 (6.3)**Internal Goals**

Discussions with Staff surfaced that when these internal goals were created, strategies were assigned directly to staff members. These were considered operational objectives for staff to work on and later present to the Board. While DHCD's website does indicate that these are internal goals, there is a lack of clarity among the Staff and Board on their true purpose. Furthermore, it has created confusion for some grantees who request funding for the internal goals 1 & 4.

High-Priority Goals

The entire Discovery process, from document review to insights from partners to conversations with the Board and Staff, has reaffirmed that these goals are representative of the largest challenges facing Coachella Valley residents and continue to be a high priority for the organization. They are in line with clearly identified gaps from the Huron report, CNHA needs assessment, and HARC survey, which all highlight the primary care shortage, the behavioral health crisis experienced by the Coachella Valley, and the environmental factors adversely affecting the health of Coachella Valley residents.

Non-Priority Goals

The two non-priority goals, 5 and 7, were created to accommodate the breadth of health-related needs of the Coachella Valley community and have served to provide some flexibility when emerging needs arise that do not align with the priority goals. These goals are visible on the website, but as gathered from sessions with staff, they can cause confusion and misalignment for grantees due to their lack of clarity. When the strategic plan was revisited in 2023, goals 5 and 7 were categorized as "non-priority". In addition, strategy 6.3 under goal 6 was also determined to be a non-priority during the 2023 strategic plan review.

Current Strategic Plan Prioritization Exercise Review

Summary:

The purpose of this exercise was to pinpoint which strategies have made the most significant impact, identify areas for progress, and discover opportunities for improvement as we transition into the strategic planning phase of this project.

Strategies linked to Goals 2, 3, and 6 continue to emerge as top organizational priorities. These areas have been focal points throughout the current plan and have shown meaningful effects within the community, providing a solid foundation for future development while highlighting successful initiatives.

Goal 5 has been identified as a lower-confidence and lower-priority area among participants. Qualitative feedback indicated that ambiguous terms, such as acting on a "situational basis," contributed to a sense of vagueness and interpretative flexibility regarding the goal. Although it addresses critical issues like homelessness and affordable housing, the goal's broad scope, lack of clarity, and low-priority status have limited its capacity to create a tangible impact during the current strategic planning period.

MosCow - Identifying Strategies to Carry Over to the new Strategic Plan

The first component of the exercise was for respondents to determine which strategies from the current strategic plan must, should, could and won't be carried over.

Must-have: Essential requirements that must be included for the project to be considered a success. Without them the project is considered a failure or cannot be completed.

Should-have: Important requirements that are highly desirable but not essential. They should be included if possible but the project can still be considered a success without them.

Could-have: Requirements that are nice to have but are not essential. They are considered low priority and included if time and resources allow.

Won't-have: Requirements are not essential and are not planned to be included in the current project. They may be considered for future plans.

The results below show strategies where over half of respondents agreed they must or should be carried over. Other strategies (e.g., 6.1 and 6.2) received most votes in these categories but did not meet the majority threshold, and are therefore not included below. [The full results of this exercise are available here.](#)

MUST

Strategy	Details	# of Individuals who indicated 'MUST'
2.1	Play a role in raising awareness and addressing the impact of air quality in the Coachella Valley and the health of community residents and be a catalyst for community organizations to implement solutions.	10/12
2.3	Provide funding support and evaluation to community organizations providing expanded mobile primary and specialty care services.	9/12
1.1	Develop a healthcare delivery system vision for the Coachella Valley.	8/12
1.5	Identify opportunities and implement selected joint ventures/partnerships with community organizations to jointly support funding of selected community health needs.	7/12
3.1	Provide funding to support an increase in the number of behavioral/mental health professionals (includes training).	7/12

SHOULD

Strategy	Details	# of Individuals who indicated 'SHOULD'
3.4	Provide funding support to Community - Based Organizations providing tele-behavioral/mental health services.	10/12
3.3	Provide funding to Community - Based Organizations enabling an increase in the number and the geographic dispersion of sites providing behavioral/mental health services (consider co-location with other health services).	9/12
3.6	Educate community residents on available behavioral/mental health resources.	8/12
2.4	Provide funding to support community organizations providing primary and specialty care via telehealth.	7/12

Which strategies have been effectively advanced?

Respondents were asked to indicate to what extent they believe the strategies under the current strategic plan have been effectively advanced. We've included strategies with strong confidence (over 80% confidence level) and strategies with low confidence (under 40% confidence level). Strategies with strong confidence indicate that individuals feel the strategies were effectively advanced, while strategies with low confidence indicate that individuals feel the strategies were not effectively advanced. [The full results of this exercise are available here.](#)

STRONG CONFIDENCE

Strategy	Details	Confidence Level
6.1	Play a role in raising awareness and addressing the impact of air quality in the Coachella Valley and the health of community residents and be a catalyst for community organizations to implement solutions.	89%
2.3	Provide funding support and evaluation to community organizations providing expanded mobile primary and specialty care services.	88%
2.7	Utilize an equity lens to expand services and resources to underserved communities.	80%

LOW CONFIDENCE

Strategy	Details	Confidence Level
5.3	On a situational basis, play a role in raising awareness of/facilitating progress on the social determinants of health specific to <i>poverty</i> among community residents and be a catalyst for community organizations to act in implementing solutions.	25%
5.1	On a situational basis, play a role in raising awareness of/facilitating progress on the social determinants of health specific to <i>homelessness</i> of community residents and be a catalyst for community organizations to act in implementing solutions.	33%
5.4	Promote health action planning and co-location of healthcare services in affordable housing developments. – Funding grants specific to this strategy would be contingent on the funds being used for access to healthcare services (for example, a clinic) incorporated in the housing.	36%
3.5	Work with new private psychiatric and community hospitals to identify opportunities to collaborate on the delivery of community - based behavioral/mental health services.	38%
5.2	On a situational basis, play a role in raising awareness of/facilitating progress on the social determinants of health specific to <i>affordable housing</i> for community residents and be a catalyst for community organizations to act in implementing solutions.	39%

Which strategies have had a positive impact on the community?

Exercise respondents were asked to indicate to what extent they agree that the strategies under the current strategic plan have had a positive impact on the community. We've included strategies with strong confidence (over 80% confidence level) and strategies with low confidence (under 40% confidence level). Strategies with strong confidence indicate that individuals feel as though the strategies have had a positive impact on the community, while strategies with low confidence indicate that individuals feel as though the strategies have not had a positive impact on the community. [The full results of this exercise are available here.](#)

STRONG CONFIDENCE

Strategy	Details	Confidence Level
2.3	Provide funding support and evaluation to community organizations providing expanded mobile primary and specialty care services.	93%
6.1	Play a role in raising awareness and addressing the impact of air quality in the Coachella Valley and the health of community residents and be a catalyst for community organizations to implement solutions.	85%

LOW CONFIDENCE

Strategy	Details	Confidence Level
5.3	On a situational basis, play a role in raising awareness of/facilitating progress on the social determinants of health specific to poverty among community residents and be a catalyst for community organizations to act in implementing solutions.	33%
3.5	Work with new private psychiatric and community hospitals to identify opportunities to collaborate on the delivery of community - based behavioral/mental health services.	38%

DETAILED FINDINGS

01 Reaffirming and Refining DHCD's Vision & Mission

An organization's True North inspires unity and purpose, serving as a powerful compass as the organization continues to expand. Furthermore, it helps every internal and external stakeholder see how their unique contributions drive the mission forward, creating a strong sense of connection and shared responsibility.

The first two components of an organization's True North are its Vision and Mission statements. The Vision statement, the foundation of a strategic plan, is a picture of what the world looks like if DHCD succeeds. The Mission statement is the roadmap that will be used to achieve the Vision. Once these are set, we can create a through line between the remaining elements in an organization's True North, which include its values, strategic pillars, key initiatives, and key metrics. This ensures the organization can be both efficient and effective while creating clarity and alignment for internal and external stakeholders.



DHCD/F Mission

To achieve optimal health at all stages of life for all District residents.

DHCD/F Vision

*Equitably connecting Coachella Valley residents to health and wellness services and programs through philanthropy, health facilities, information and community education, and public policy.

**Equitably is intended to convey that all residents of the Coachella Valley will be able to access any portion of the healthcare delivery system. Improving access to healthcare resources entails removing barriers to care*

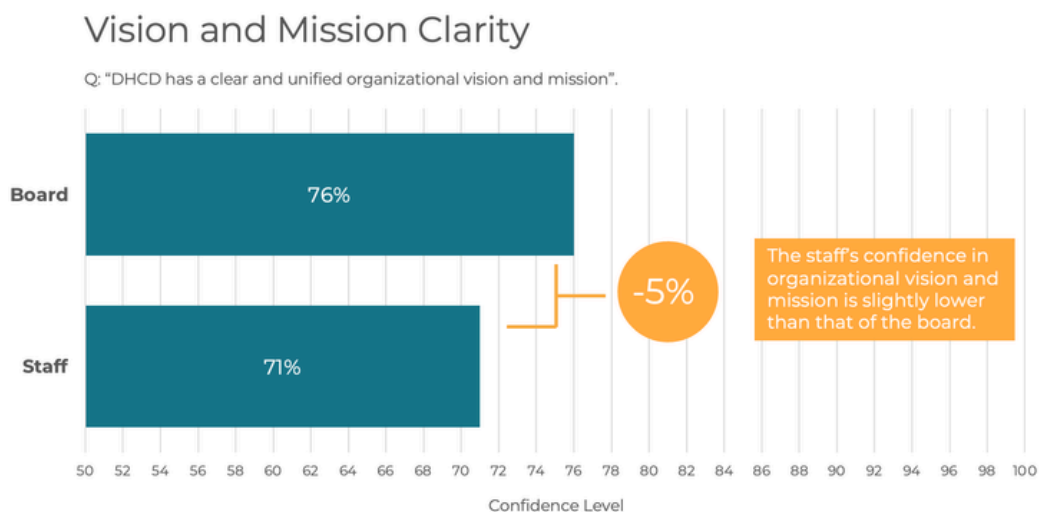
As we move forward with long-term planning, it is essential that all goals, strategies, and actions are aligned with the DHCD core mission and vision. This alignment ensures that every effort contributes toward the broader goal of improving health and wellness across the Coachella Valley.

(DHCD RFP)

During our Discovery process, we identified a strong conceptual alignment with DHCD's Mission and Vision statements, with a general agreement that the current statements are meaningful and provide a solid direction. However, we also discovered an opportunity to enhance them to be clearer, more distinctive, and a stronger foundation for the organization's True North.

Discussions during workshops with staff and the Board revealed several shared priorities for enhancement. Participants agreed that the statements should be "flipped" to align with traditional definitions, where the Vision outlines the aspirational future and the Mission specifies the organization's purpose and activities. The conversations highlighted the need for crafting statements that are succinct, memorable, and easily communicated, while also clarifying DHCD's unique identity as a funder, convener, and incubator of programs, rather than a direct service provider. Finally, as we move forward with the strategic planning process, it's crucial to ensure these statements continue to embody and reflect DHCD's core values of equity, community engagement, innovation, and collaboration.

Our survey results show moderate confidence among staff and Board members regarding the clarity and unity of the Vision and Mission statements. This reflects qualitative feedback and emphasizes the potential for refining these statements to better connect them to strategic decision-making.



Recommendation:

- Flip the Mission and Vision Statements to align with conventional definitions and improve clarity.
- Design and conduct a True North workshop to enable the District Staff and Board to collectively refine both Vision and Mission statements and ensure they embody the current priorities and future potential.
- Develop succinct, actionable statements that balance aspirational goals with clear priorities, providing flexibility for future growth while maintaining strategic focus.

02 Define District and Foundation Roles to Reflect New Paradigm

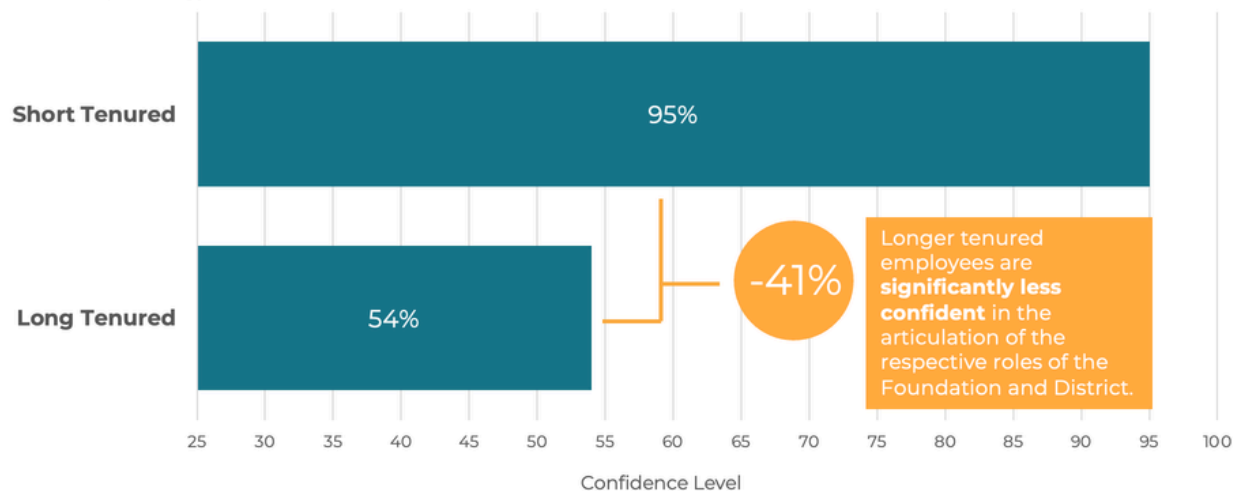
The Desert Healthcare Foundation was created in 1967, 20 years after the inception of the District, to support the Desert Regional Medical Center. In the last 60 years, it has shifted from hospital fundraising to operating community-based health programs to now being a fiscal sponsor and incubator for regional health initiatives. In 2003, governance was consolidated under the District Board, and a single strategic plan guides the efforts of both the District and Foundation.

Our Discovery process revealed unclear boundaries and inconsistent understandings of the respective roles of the District and Foundation. Worksessions with staff highlighted differing views on whether the District and Foundation should continue to operate as a unified entity or whether they should have separate identities to improve transparency and better attract external funding. A consensus among staff was that the public does not have a good understanding of the difference between these two entities, and their separate roles are not clear. The in-person worksession with the Board highlighted how the District's and Foundation's roles have evolved, echoing a need for further discussion on these entities as the new strategic plan is developed.

The survey reinforced this finding - staff are only moderately confident that the respective roles of DHCD's Foundation and District are well articulated, understood, and represented. Interestingly, long-tenured employees are 41% less confident in this statement than short-tenured employees. This may suggest that those with longer tenures have witnessed more shifts in the Foundation's purpose, structure, and visibility over time, leading to uncertainty about its current role. Conversely, newer staff may perceive the two entities as more unified, having entered the organization at a time when their operations and communications are more closely integrated.

Clarity of DHCD's Foundation vs. District Roles

Q: "The respective roles of the DHCD's Foundation and District are well articulated, understood, and represented".
(Staff only)



Our comparative research into other healthcare districts across California revealed that those with affiliated foundations, for example, Palomar Health, typically maintain a separate board of directors, distinct messaging, and independent websites, providing a clear differentiation between the two entities. Some examples include: El Camino Healthcare District, Palomar Health and Sonoma Valley Health Care District.

Recommendation:

DHCD should consider developing a comprehensive strategy to clarify and optimize the Foundation's role in advancing the District's strategic goals. This should include:

- Identifying opportunities to position the Foundation as a strategic vehicle for partnerships, innovation, and philanthropic investment.
- Evaluate the benefits and challenges of developing a separate yet complementary strategic and staffing plan for the Foundation.



03

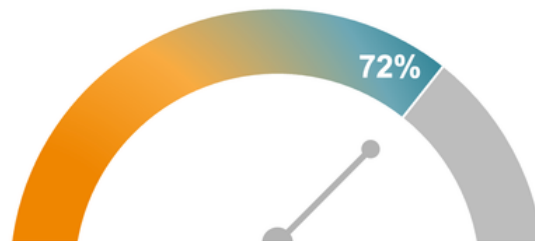
Refining Focus and Strengthening
Strategic Alignment

Desert Healthcare District's current strategic plan provides a strong foundation for the organization's mission but lacks the clarity, focus, and measurability required to guide decisions and evaluate impact effectively. It's important to note that this plan was developed with 4 out of the 7 current Board members, and without formal input from the Leadership and Staff. This indicates an opportunity to ensure that the voices of current stakeholders are actively included in the development of the new plan.

The current plan's seven goals and thirty-four underlying strategies are broad and read as aspirations rather than actionable activities. Work sessions with the Board and staff have further clarified that the full meaning and intent of some strategies are unfamiliar, and there are vague terms without a clear definition. Consequently, the current strategic plan is not guiding the organization's work to the extent it should be. Our survey revealed that, on average, the DHCD Staff and Board are only moderately confident (72%) that the current strategic plan is an effective tool that drives activities, investments, and decisions, offering room to optimize alignment for the next 5 years and beyond.

Driving Decisions Through Strategy

Q: "DHCD's current Strategic Plan is an effective tool that drives our activities, investments, and decisions".
(Staff + Board average)



Throughout discussions with the Board and Staff, there was thoughtful dialogue around how DHCD defines and approaches prioritization. While there is a collective desire for the strategic plan to reflect the diverse perspectives and needs of its stakeholders, many individuals also acknowledged that being strategic means making deliberate choices about where to focus energy and resources. Some believe that labeling goals as “high” or “low” priority can carry unintended connotations; others offer suggestions around language, such as “aligned with mission” or “core to mission,” to better categorize strategies. Within the goals themselves, there is an additional need for greater focus to make the strategies actionable and measurable. Not only does this strengthen the tie between the organization's True North, but it also contributes to a clearer grant process. As one staff member noted in their survey response:

“Narrow the focus of strategic plan goals. For example, primary care and behavioral healthcare are too broad. The goal to increase access to primary care could focus on building clinics in underserved areas and recruiting/helping to staff them, instead of the wide range of topics covered in grant applications.”

Establishing clear strategic priorities enables DHCD to evaluate potential initiatives in a structured and equitable way, consistently asking: Does this opportunity advance our mission and vision? Does it align with our strategic pillars? Can we measure its impact? This approach does not limit flexibility; rather, it creates a framework that allows DHCD to balance clear priorities with the ability to respond to emerging needs or crises.

An analysis of similar healthcare district strategic plans supports the recommendation to limit the total number of strategic priorities. For instance:

- **The Grossmont Healthcare District** focuses on three priorities: Community Health and Wellness, Hospital Partnership, and Chronic Disease.
- **The Beach Cities Health District** emphasizes four priorities: Programs and Services, People and Partnership, Transparency, and Infrastructure and Financials.
- **The Sequoia Healthcare District** identifies five priority areas: Equity and Inclusion, Innovation, Collaboration, Communication, and Advocacy.

The review of other healthcare districts also reveals an opportunity for the Desert Healthcare District to consider explicitly incorporating equity and financial stewardship into the new strategic plan. A full list of the other Healthcare Districts reviewed can be found [HERE](#).

Recommendation:

- Facilitate structured working sessions with the Board and Staff to review the current strategic plan and make informed decisions about which strategic pillars and activities should be carried forward into the FY 2026–2031 plan.
- The aim should be to reach consensus on 3 to 5 goals and avoid “catch-all” goals.
- Differentiate between strategies and activities to clarify the hierarchy of goals, improve tracking and reporting, and ensure each action is directly tied to a measurable strategic objective.
- Develop a SMART goal framework to create stronger accountability and clearer alignment with outcomes.
- Ensure clear and consistent language and nomenclature so that both internal and external stakeholders easily understand the DHDC’s strategic priorities.

04

Thoughtful Integration of Determinants of Health Approaches into Planning & Design

In discussions with staff, Board members, and partners, the Determinants of Health consistently surfaced as a critical framework for advancing equity and addressing the health concerns of Coachella Valley residents. Integrating DOH in the new strategic plan will ensure that each investment not only prevents and treats illness but also transforms the conditions that create it. However, DOH must be integrated thoughtfully, used to guide priorities and assess where DHCD can make the greatest impact, not as a catch-all for every issue. While understanding DOH is essential, DHCD must remain focused on its vision, mission, and True North, balancing ambition with practicality to ensure its strategy is both evidence-based and operationally sustainable. As one staff member emphasized:

“ Social determinants of health is an extremely broad concept. Almost any organization or activity could claim to fit under this umbrella, which makes it difficult to prioritize, track, or evaluate impact. When the scope is this wide, the District risks funding a wide array of small, disconnected projects that have little measurable effect. ”

In both virtual and in-person work sessions, the Board has shown a strong and consistent commitment to the Determinants of Health as a central component of DHCD's mission and future strategy. Members emphasized that factors such as housing, food security, education, and transportation are essential to improving community health. While some advocated for DOH to stand as distinct strategic pillars and others preferred integration across all goals, there is alignment that Determinants of Health must be considered during the strategic planning process.

During initial site visits with five community partners, housing, environmental health, and access barriers were consistently identified as the most pressing issues affecting the health and well-being of Coachella Valley residents. The lack of affordable housing, rising utility costs, and overcrowding have deepened financial stress and mental health challenges, while poor air quality, water access issues, and worsening conditions around the Salton Sea threaten physical health. These partners also cited transportation gaps and outdated infrastructure, particularly in the East Valley, as major barriers to accessing care and opportunity. As additional community visits unfold throughout the next phases of the project, further insights will be generated to ensure the community voice is centered in the new strategic plan. Other considerations could include reaching out to cities, special districts, and other nonprofits that specialize in DOH to create true collective impact.

These perspectives are essential to shaping a strategic plan that reflects the community's lived realities. However, there remains a lack of consensus on which determinants should fall within DHCD's remit, and concern about the financial implications of addressing them too broadly. The next plan must therefore balance ambition with practicality, focusing on areas where DHCD can have the greatest impact, influence, and fiscal responsibility.

Recommendation:

- Design and moderate a workshop on the Determinants of Health to build a shared understanding and framework among the Board, staff, and partners.
- Define how DOH principles will inform the strategic planning process, ensuring alignment with DHCD's mission, vision, and focus areas.
- Integrate DOH considerations into strategic plan design, operational planning, and evaluation to link equity goals with measurable impact.
- Connect DOH integration to social return on investment (SROI) to assess both community outcomes and organizational effectiveness.



05

Leveraging Data-Driven Insights

An organization's ability to adopt best practices in using data-driven insights is key to making smart decisions that drive sustainable impact and ensure long-term economic viability. Desert Healthcare District has a significant number of data sources to inform their understanding of community needs, activities, and strategic direction. These qualitative and quantitative sources range from health needs assessments published by partnering institutions to grantee data and feedback to individual resident experience. The data collected by DHCD also spans the full lifecycle of the District's work, from routine progress tracking and grantee reporting, to final report data collection, to RFP Data Walks and grantmaking insights that inform strategic planning.

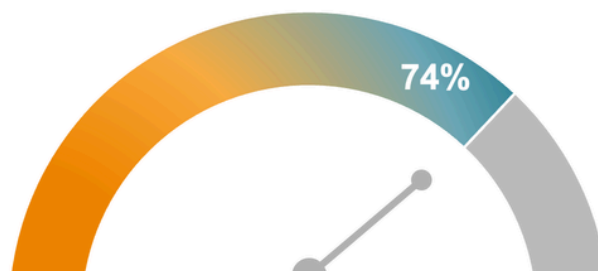
However, our initial analysis shows that data isn't consistently used to make data-driven decisions, and the lack of specificity of the current strategic goals makes it challenging to align data to measurable outcomes. By thoughtfully balancing and integrating all available data, DHCD can ensure the next 5-year strategy is evidence-based, equitable, and responsive to evolving conditions. A clearly defined and data-driven strategy will further enable the District to track outcomes, measure impact, and evolve its strategy as new needs emerge.

Amid the wide range of health issues facing Coachella Valley residents and the diverse perspectives represented on the Board, maintaining objectivity and focus is essential to ensuring decisions are made in the best interest of the community. As one survey respondent noted, the goal should be "unbiased decision-making for the benefit of the health and well-being of district residents," emphasizing that the strategic plan should be rooted in data and evidence.

Survey results suggest that while DHCD values data, it has not yet fully developed the unified culture and systems needed to leverage it effectively. DHCD Staff are only 74% confident that leadership clearly communicates the importance of data and insights as core components of the organization's work—indicating room to strengthen the internal "data culture".

Fostering a Data-Driven Culture

Q: "DHCD's leadership clearly communicates the value and importance of data and insights as key components of organizational work".
(Staff only)

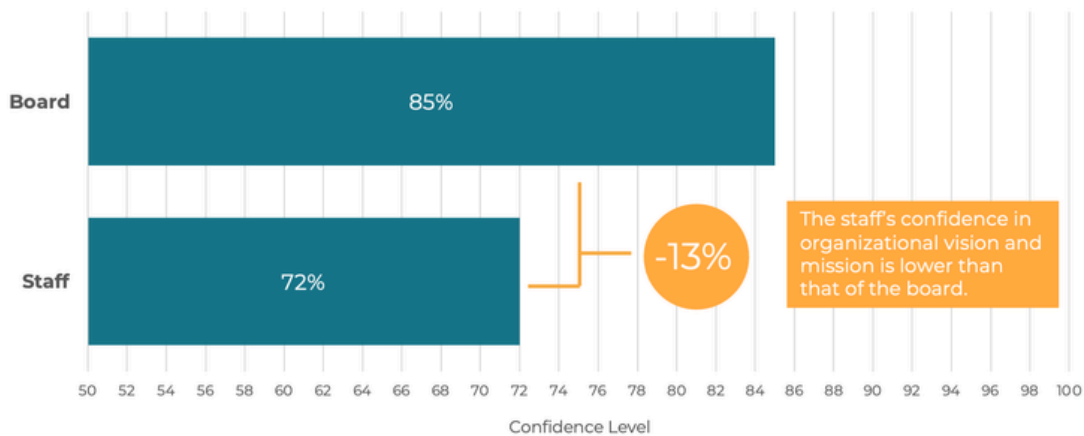


Additionally, there is a 13% confidence gap between staff and the Board on how data and insights are used to measure impact, suggesting differing perspectives. Board members may see integration at the strategic level, while staff who work more directly with program data face greater challenges in collecting, analyzing, and operationalizing it. Similarly, confidence that data is leveraged to drive funding is moderate, with both the Board and Staff showing just 69% confidence.

This shared gap suggests that while data is being collected, it is not yet fully integrated into decision-making processes in a way that consistently drives funding priorities, measures outcomes, or demonstrates impact. Strengthening this connection between data and resource allocation will be critical to ensuring DHCD's investments are evidence-based and responsive to community needs.

Effectively Measuring Impact

Q: "DHCD effectively uses data and insights to measure the impact of our work".



While DHCD's current strategic plan was informed by a range of sources, its goals and underlying strategies are not SMART. SMART goals are specific, measurable, attainable, relevant, and time-bound, and greatly strengthen an organization's credibility and accountability. They turn the broad ambitions laid out in the current plan into clear, measurable, and actionable priorities. Creating these goals will allow for more data-informed decision-making, aligned with DHCD's True North.

Recommendation:

- Develop a SMART data dashboard to align decision-making, track progress, and build a shared understanding of DHCD's current state, performance, and opportunities for improvement.
- Establish formal data frameworks, processes, and guidelines to ensure consistency and continuity in data management and reporting—particularly important during periods of staff or resource transition.
- Evaluate internal roles and responsibilities related to the coordination of data collection, analysis, and reporting to guide programmatic and funding decisions in addition to existing resources.

06 Building an Internal Culture of Collaboration

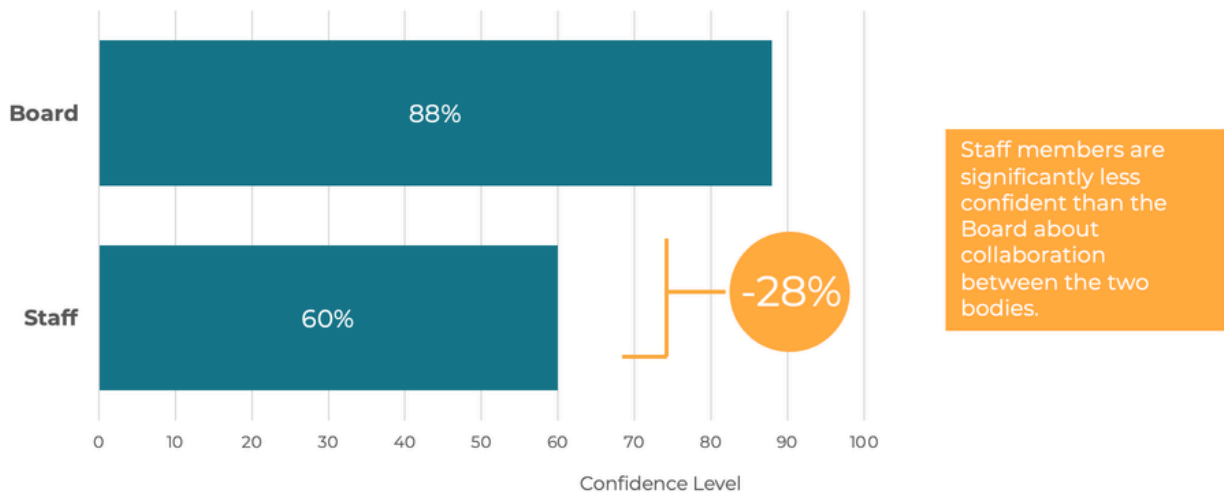
As DHCD develops its new strategic plan and the organizational structure required to execute it—particularly given the anticipated influx of significant funding—both staff and Board members recognize the critical need to strengthen internal collaboration and communication. DHCD's capacity to drive meaningful external impact depends fundamentally on how effectively its teams, roles, and governance levels work together internally.

Our Discovery research found gaps in alignment and communication within DHCD that can, at times, lead to tension or differing interpretations of priorities. Notably, DHCD staff is nearly 30% less confident than the Board that there is effective communication, collaboration, and alignment between the staff and board. Qualitative feedback we've received has also reinforced this sentiment, with one staff member noting that if they had a magic wand to change anything within the organization, it would be:

“ Better communication and collaboration with the Board of Directors as it appears as though staff contributions and input aren't always appreciated or acknowledged ”

Collaboration Between The Board and Staff

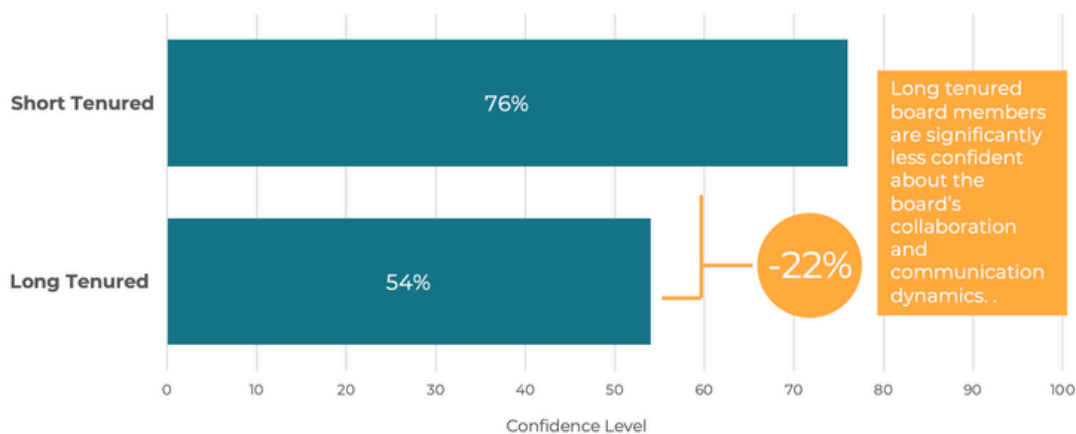
Q: "I see effective communication, collaboration, and alignment between DHCD's staff and Board".



Our survey also evaluated collaboration within the Board and Staff, respectively. Board members expressed only 63% confidence that Board members collaborate and communicate effectively with each other, with longer-tenured Board members showing 22% less confidence than shorter-tenured, suggesting shifting dynamics and perspectives over time. By contrast, staff reported 86% confidence in their internal collaboration.

Collaboration Within The Board

Q: "I believe all board members collaborate and communicate with each other effectively".
(Board only)



One staff member appropriately highlights the value of collaboration, noting:

Tools and policies can only take us so far - what really drives efficiency and impact is having people who are open to change, respectful of their roles, and committed to working together rather than in silos

The current strategic plan was developed without substantial input from staff—despite their frontline role in implementing DHCD's programs and cultivating community partnerships. For the upcoming planning process, integrating staff perspectives will be essential to ensure that strategic goals are both operationally grounded and genuinely actionable.

Recommendation:

- Include leadership and select staff in all strategic planning sessions to ensure shared understanding, two-way communication, and alignment from design through implementation.
- Create structured opportunities for staff to contribute input into the new strategic plan and ongoing strategic reviews, reinforcing ownership and accountability across all levels of the organization.
- Facilitate periodic joint Board–staff workshops and immersion days to strengthen relationships, clarify roles, and promote a culture of mutual respect and collaboration.

07 Centering Community Voices

Community engagement is foundational to DHCD's mission. Centering community voices must remain a core priority in both DHCD's ongoing work and the development of its next strategic plan. Staff, board members, and partners universally recognize that a truly community-centric strategy requires systematically integrating resident input on a regular and consistent basis. Our discovery process revealed two critical gaps: insufficient integration of community insights and fragmented systems for gathering feedback.

The Board and staff expressed moderate, leaning towards low, confidence levels that the current strategic plan meets community needs. While Staff were 67% confident in this statement, the Board was only 57% confident - this is the lowest confidence rating among all Board survey questions. These confidence scores suggest a shared understanding that stronger, more consistent engagement mechanisms are needed to ensure community priorities are reflected in DHCD's strategic planning.

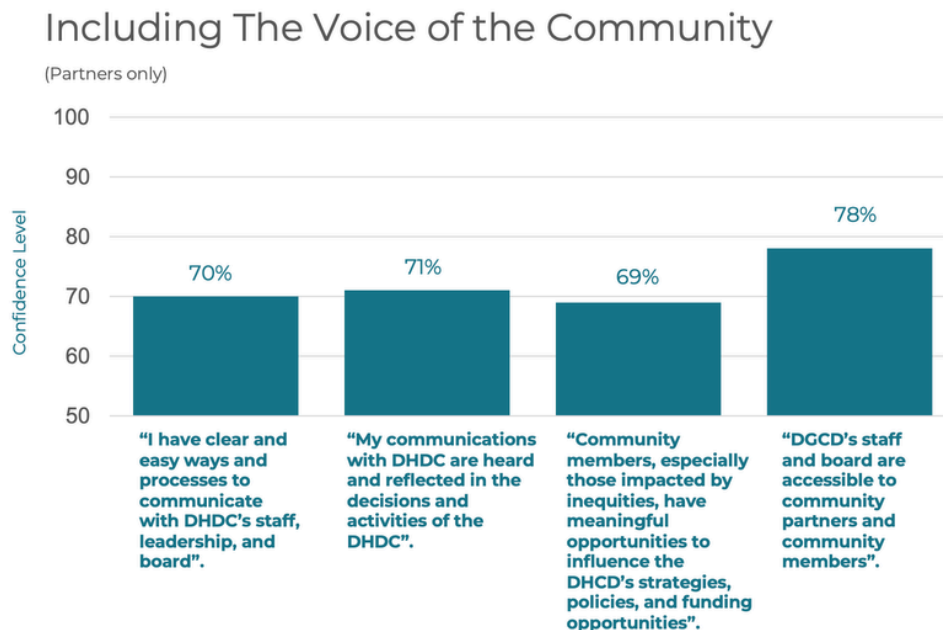
Meeting Community Needs

Q: "The DHCD's current strategic plan effectively meets the needs of the community".



Staff described the community voice as being only "loosely integrated" in the design of the previous strategic plan, while the Board noted that although the process was inclusive in intent, community participation was weaker than desired. Feedback systems currently rely on passive channels such as social media comments, the District's website, and the general "info@dhcd" email address, which staff collectively acknowledged could be improved and better promoted to encourage meaningful public input.

Results from the partner survey suggest an opportunity to increase engagement, with only moderate confidence in their access, influence and equitable opportunity to engage with DHCD, demonstrating that while channels exist, they need to be optimized.



This sentiment was also perceived in the Board and Staff survey, with both groups showing only moderate confidence that community insight, information, and feedback are regularly collected to better understand stakeholders. With respective 67% and 62% confidence levels, this was one of the lowest-scoring questions on the survey.

Moreover, DHCD's activities and grantmaking have historically been concentrated in the West Valley, underscoring the need for more equitable outreach and investment in the East Valley to ensure all residents' needs are represented. Partners echoed this sentiment, emphasizing the importance of "community member involvement, representation, and voice" in shaping health strategies and funding priorities.

DHCD's Data Walks have proven to be an effective way to engage stakeholders and align strategic priorities with community needs. These sessions translate local health data into accessible insights, fostering dialogue and collaboration between DHCD, partners, and residents. Partners who participated expressed appreciation for the opportunity but noted limited follow-up and a lack of clarity on how their ideas, thoughts, and comments were integrated, highlighting the need to strengthen the feedback loop and make outcomes more visible.

Recommendation:

- Continue and strengthen Data Walks to ensure findings and community input are reflected back to participants and used to inform decision-making.
- Host community engagement sessions in early 2026 to gather input and ensure initiatives remain culturally relevant and responsive to resident needs.
- Establish ongoing feedback channels after implementation of the new strategic plan to integrate new learning and emerging community trends.
- Increase Board presence at community events to build trust, visibility, and two-way communication with residents.

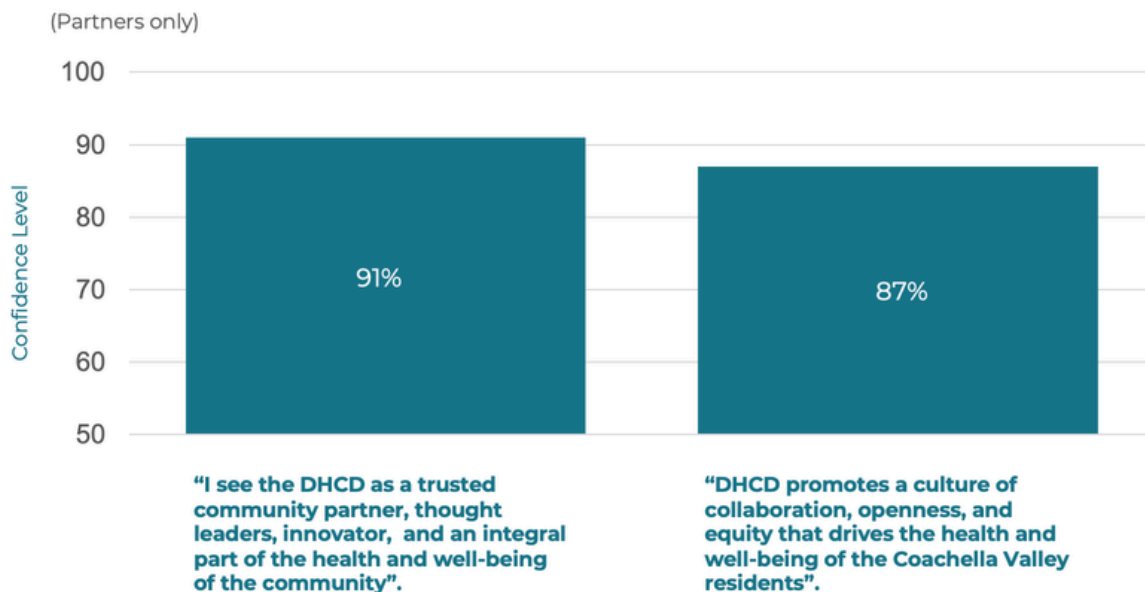
08 Amplifying Collaboration Among External Stakeholders

DHCD has established itself as a trusted partner, convener, and collaborator across the Coachella Valley. Building on this strong reputation, DHCD is well-positioned to unify the region's fragmented health ecosystem and serve as the connective tissue among disparate stakeholders. With more than 800 nonprofits operating in the region, many planning and delivering healthcare services in isolation, duplication of efforts, and resource competition are common challenges.

Across stakeholder discussions, surveys, and partner meetings, a clear theme emerged: where DHCD already collaborates, it makes an outsized impact, and there is now an opportunity to amplify that influence by connecting organizations, facilitating knowledge-sharing, and promoting a culture of partnership to solve the Valley's most pressing health-related issues.

The Partner survey revealed very high confidence that DHCD is a trusted community partner and promoter of a culture of collaboration that drives the health and well-being of Coachella Valley residents.

External Stakeholder's Partnership View



Our meetings with partners echoed these sentiments, with DHCD being referred to as a “critical friend” offering constructive challenge, strategic guidance, and access to resources that strengthen grantee program design. They are viewed as “doers”, not passive funders, who co-lead initiatives, offer hands-on support, and act as reliable sounding boards.

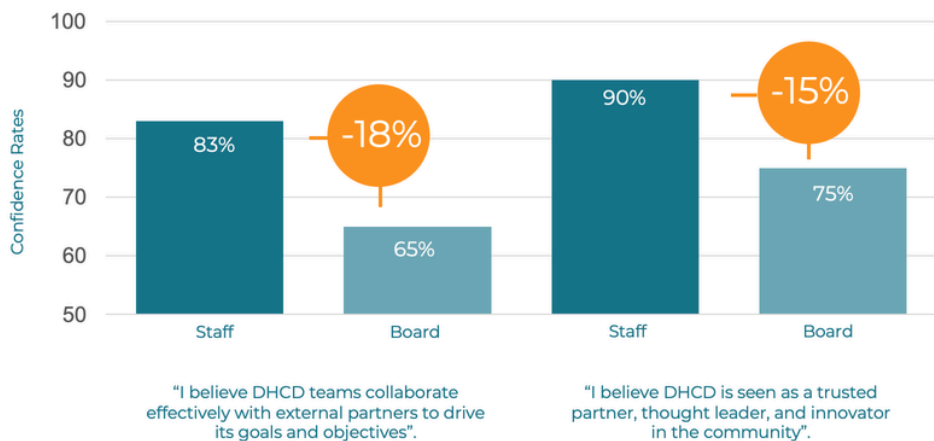
Nonetheless, nonprofits in the Coachella Valley compete for limited resources, and as a partner at JFS noted, “tribalism” limits impact. A DHCD Board member further strengthens this perspective, noting:

“ There are a wide variety of organizations planning or delivering healthcare in the Coachella Valley in isolation. There seems to be stand alone islands of agencies who could benefit from a more integrated organization of resources and goalsharing. I would predict that integrating logically compatible organizations would produce greater efficiency and the bottom line impact of funds distributed by DHCD would be enhanced . It seems like everyone is in their own silo ”

Conversations with different staff members revealed that within DHCD’s internal processes, there is limited practice of sharing information or insights among grantees, even when valuable data is being collected through DHCD-funded programs.

Survey results also reveal inconsistencies in perceptions of collaboration and external engagement within DHCD itself. Staff express significantly higher confidence than the Board in both their effectiveness working with external partners to advance goals (83% vs. 65%) and in how DHCD is viewed by the community as a trusted partner, thought leader, and innovator (90% vs 75%). This gap may reflect the staff’s day-to-day involvement in partnership activities and greater proximity to external stakeholders, while the Board’s more variable responses suggest differing levels of visibility and engagement across the District’s geographic zones.

The Value of Partnership



Recommendation:

- Position DHCD as a collaboration catalyst and trusted convener by using its influence to align shared goals, reduce duplication, and drive greater efficiency across the Coachella Valley's health ecosystem.
 - Establish structured grantee cohorts that connect organizations with similar focus areas to exchange data, share best practices, and co-design community solutions.
 - Facilitate regular peer learning and cross-sector convenings to make collaboration a core element of DHCD's grantmaking model.



09 Growing Brand Recognition

Despite DHCD’s communication investments across the Coachella Valley, overall public awareness of the organization remains limited. Throughout the Discovery process, staff, the Board, and partners noted that many residents are still unaware of the District’s role and impact, and a significant portion of the community still associates DHCD with the Desert Regional Medical Center. The 2023 Measure AA campaign did slightly raise visibility, but awareness could be improved to translate to a more consistent understanding of DHCD’s role in the community.

The survey issued to Partners revealed moderate to strong confidence that individual partners have a clear understanding of the initiatives, activities, and investments of DHCD’s work in the Coachella Valley, highlighting room to improve visibility, further reinforced by one of the partners’ comments:

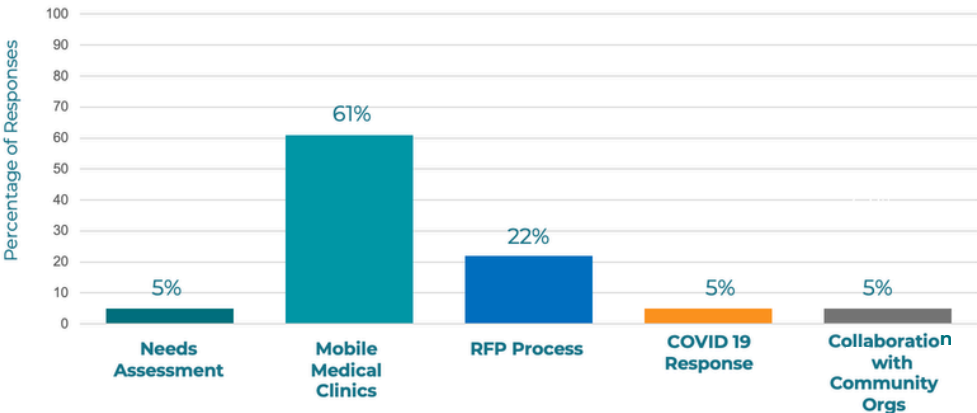
“ I would continue to improve on accessibility and awareness of DHCD health/project efforts. Because of the history of large government entities with vulnerable communities there is a natural mistrust and/or disconnection. Doing more efforts of being IN and AROUND spaces or events organized by local communities that are most marginalized, instead of the community having to find/discover DHCD would be an improvement. Such as attending local school events, connecting with families at family events, supporting CBO that are not grantees, publicly voicing advocacy for the wellbeing of specific vulnerable communities, etc.

”

One of DHCD’s most successful initiatives that was overwhelmingly cited as an effective effort undertaken by DHCD is the mobile medical clinics. This high visibility initiative has had incredible impacts on the community and is a testament to DHCD’s great work.

DHCD’s Successful Initiatives

Q: “What, to your mind, has been the most effective and successful initiative/effort undertaken by DHCD in the last 3 years?”
(Board and Staff)



Additionally, recent initiatives such as the Healthy Desert, Healthy You Podcast and the yearly Environmental Healthy Desert, Healthy You Summit have increased DHCD's thought leadership and elevated its public profile.

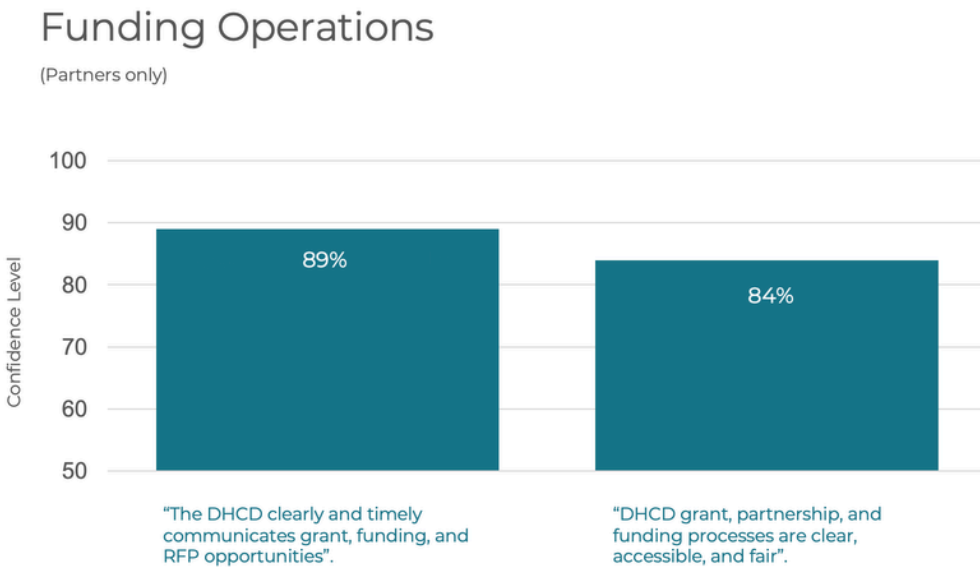


Recommendation:

- Identify additional visible community investments such as the Mobile Clinics to increase brand visibility.
- Consider physical infrastructure opportunities that make DHCD's presence more tangible across the Valley.
- Develop a targeted marketing and communications plan with Objectives and Key Results (OKRs) to strategically grow brand awareness and reinforce recognition of DHCD's contributions beyond grantmaking.

10 Optimizing and Streamlining Grantmaking

Throughout our Discovery Process, we identified DHCD’s grantmaking process as an organizational strength. The process of submitting, reviewing, and issuing grants is clearly outlined and contributes to DHCD’s reputation as a trusted steward of resources. Our partner survey revealed high confidence in DHCD’s communication of funding opportunities as well as the accessibility and fairness of funding processes.

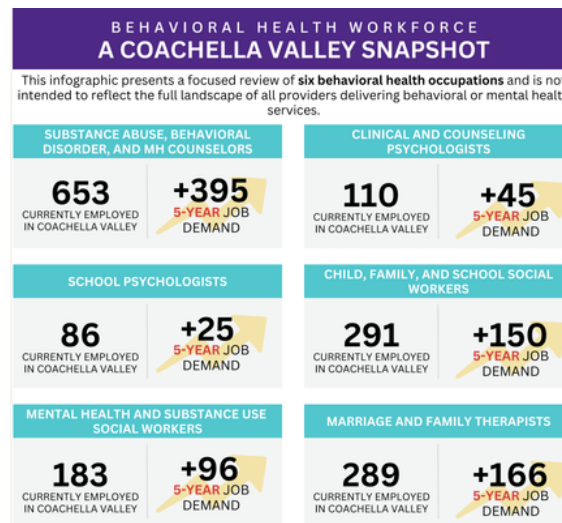


The value of Data Walks and RFPs has been expressed across stakeholders and positioned as a great opportunity for DHCD to engage the community as well as identify relevant and timely funding opportunities. One partner noted:

“One of the most effective efforts by DHCD in the past three years has been the advancement of RFPs. These efforts not only help us understand what is really happening on the ground but also allow us to learn directly from the organizations we partner with.”

Alongside these strengths, DHCD faces several challenges in grant-making that need to be considered in the design of the next strategic plan. The District is still navigating compliance with AB2019, ensuring its requirements are fully understood and upheld across staff and the Board. Additionally, overlapping grant categories and broad strategic pillars have created ambiguity for applicants and challenges for staff in tracking progress toward defined goals. The mix of internal and external strategic goals in the current strategic plan has also caused confusion among grantees, underscoring areas for optimization for the new strategic plan.

 EMPOWERING RESILIENT YOUTH DATA WALK	
01	Welcome 12:00 - 12:20 • Opening Remarks • Introductions
02	DHCD Overview 12:20 - 12:30 • Background • Objectives • Results-Based Accountability
03	Data Walk 12:30 - 1:55 • Part One: Activity • Part Two: Group Discussions
04	Closing Remarks 1:55 - 2:00 • Next Steps • Q & A



Recommendation:

- Continue leveraging Data Walks to inform RFPs and ensure funding priorities reflect real-time community needs and lived experiences.
- Adopt SMART goals in the new strategic plan to reduce overlap, improve clarity, and strengthen alignment between grantmaking, strategic objectives, and measurable outcomes.
- Clarify internal vs. external strategic priorities either by developing two distinct but connected plans or by clearly differentiating these elements within a single strategic framework.

11 Strengthening Impact Measurement

DHCD is ahead of most peers on impact measurement, and the Board, leadership, and staff agree it's essential to responsible, effective stewardship. That said, some of the current metrics may not inform decision-making and cannot be tracked longitudinally. To understand impact over time, DHCD should prioritize indicators that inform decisions, establish baselines and targets, and include a replicable collection plan.

“Collecting sufficient data for all DHCD programs and initiatives is essential.”

The organization has made concerted efforts to implement tools and frameworks to track both grant and community activities. In conversations with staff, we were introduced to the two systems used to monitor activities and performance: Fondant and Clear Impact. These are all guided by the Results-Based Accountability (RBA) framework launched in July 2023.

While RBA has provided a foundational opportunity to measure the impact of DHCD's activities, our Discovery process has uncovered several system-level and process-related challenges. Because RBA was adopted midway through a broadly defined strategic plan, many existing programs and metrics had to be retrofitted into the framework, leading to inconsistencies in data quality and alignment. Additionally, when data is collected, it is not always timely, well-differentiated, or actionable, and results can be inconsistent across grantees, making it difficult to showcase impact to key stakeholders. Some grantees have also raised concerns that the process of reporting data can be cumbersome and confusing. These challenges highlight the need for clearer system design, shared processes, and organization-wide training of impact measurement tools.

Goal 2: Proactively expand community access to primary and specialty care services.

Goal: All residents in Coachella Valley have access to primary and specialty care services and resources to support health

Strategy 2.1: Increase the number of primary and specialty care professionals to support Coachella Valley residents (High Priority)

Strategy 2.2: Increase the number of clinical sites and the days and hours of operation for primary and specialty care services that support Coachella Valley residents (High Priority)

Strategy 2.3: Improve accessibility of primary and specialty care services by increasing available mobile health services in Coachella Valley (High Priority)

	Most Recent Period	Prior Actual Value	Current Actual Value
# of clients served by mobile health service access	FY24/25: Q2	1,131	435

Strategy 2.4: Improve accessibility of primary and specialty care services by increasing available telehealth services in Coachella Valley (High Priority)

	Most Recent Period	Prior Actual Value	Current Actual Value
# of telehealth visits	FY24/25: Q2	856	62
# of clients served as a result of telehealth access	FY24/25: Q2	-	42

Funding Impact Highlights of 2022

\$6,364,707
Funds awarded through grants, social services, and fiscal sponsorships

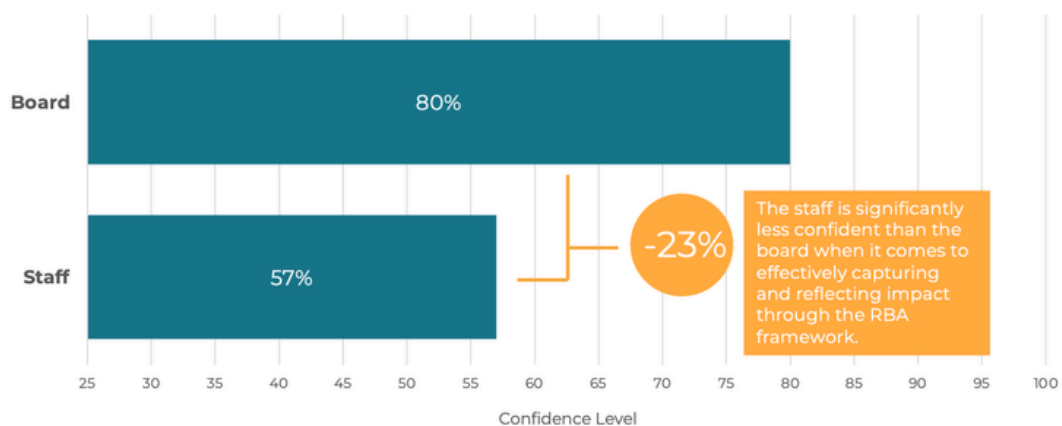
103K+
Impacted residents

46
Total grants awarded

Survey findings indicate that staff are only somewhat confident (72%) in DHCD's current use of data and insights for impact measurement. However, when asked whether DHCD's work and impact are effectively captured and reflected in the current RBA framework, confidence dropped to 57% - one of the lowest captured among staff. In contrast, Board members indicated 80% confidence in this same statement, highlighting a clear gap between strategic perception and on-the-ground operations. This underscores the need to strengthen RBA, reinforce the resources geared towards impact measurement, and amplify how impact is measured throughout the organization.

Leveraging the Current RBA Framework

Q: "DHCD's work and impact are effectively captured and reflected in the current RBA framework".
(Results-Based Accountability).



Additionally, in conversations with individuals across DHCD, we've identified that it operates similarly to a trust-based philanthropy, prioritizing strong relationships, flexibility, and reduced administrative burden for grantees. While this model fosters collaboration and trust, it also limits real-time visibility into program progress. With annual or bi-annual reporting, it becomes harder to adjust to emerging needs, assess impact throughout the year, or share learnings across grantees.

Recommendation:

- Optimize the current public-facing RBA dashboard to improve usability and clarity, and consider developing a complementary internal dashboard for real-time performance tracking, decision support, continuous learning, and impact storytelling.
- Create a clear impact measurement framework aligned with the new strategic plan to define metrics, reporting cadence, and responsibilities across teams.
- Designate dedicated staff or analyst roles responsible for data collection, analysis, and reporting to strengthen capacity and consistency.
- Ensure that an updated Impact Framework tracks impact over time, informs decisions, establishes baselines and targets, and includes a repeatable collection plan.

12

Accelerating Impact with Data Technology

While there is momentum in how DHCD uses technology to support data-driven decision-making, several operational challenges persist that hinder the efficiency and full integration of these systems. Through our Discovery process, we examined the data and technology systems utilized throughout the grants process. DHCD has established a solid foundation, with adequate systems already in place to collect relevant data, identify trends, facilitate analysis, and generate reports.

Technology is essential to DHCD's grantmaking lifecycle, spanning from data collection to reporting. As grantmaking is set to increase with the influx of funds and the implementation of a new strategic plan, DHCD has an exciting opportunity to build upon its existing technology culture. This can further enhance impact and better align current systems while exploring new solutions.

The organization employs Foundant for grants management and Clear Impact for performance dashboards. Although each system has its specific function, they operate independently and are not fully integrated or optimized. This leads to difficulties in uploading and updating forms, time-consuming data entry, and limited adaptability.

Furthermore, while an RBA dashboard is accessible on DHCD's website, the infrequency of data reporting and the wide array of strategies across numerous goals make it challenging to accurately assess true impact.

Conversations with the program team have revealed a technology gap across the organization, with few individuals proficient in the systems leveraged by DHCD. This has led to operational bottlenecks and can create dependencies on individual expertise rather than comprehensive, organization-wide processes.

When it comes to new technology, DHCD is well-positioned to explore new technology and tools like AI and Machine Learning to expand its analytical capacity and operational efficiency. In our survey, we asked the Board and Staff to what extent they agree that DHCD effectively explores and integrates new technology advancements and capabilities (such as Artificial Intelligence and Machine Learning). Respondents showed an average of 52% confidence, indicating a clear opportunity to explore new systems and assess where they may help the organization.

Recommendation:

- Maximize current tools to improve consistency, staff training, and adoption of existing tools such as Foundant and Clear Impact.
- Consider an audit of the current technology stack to identify opportunities to strengthen data systems, improve integration, and explore new tools that can best support the execution of the new strategic plan.
- Create an AI task force to assess how peer organizations are using AI, conduct risk and cost-benefit analyses, evaluate potential applications relevant to DHCD's work, and measure current staff AI literacy to inform future readiness.

13

Preparing the Organization for Sustainable Growth

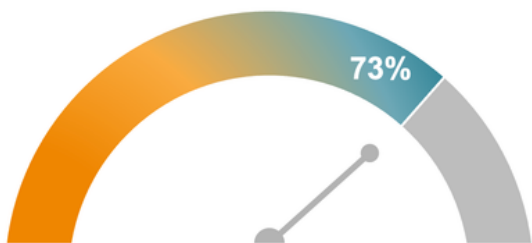
With a significant influx of funding, DHCD has the opportunity to greatly expand its grantmaking and community impact - and with that comes the need to scale its operations sustainably. To manage growth effectively, DHCD must invest in staff capacity, strengthen internal systems, and formalize its working processes to ensure efficiency, accountability, and continuity.

In our first prioritization exercise with key staff members, five out of six indicated that the organization must “Assess internal resources to ensure the District’s structure can accommodate new funding and growth & strengthen internal capacity for fiscal oversight and grant management, ensuring readiness for increased funding”, with multiple individuals noting additional staffing will be necessary to facilitate the new strategic plan and that internal work must be done to strengthen processes, clarify job boundaries, and ensure alignment across staff responsibilities.

The Board and Staff survey highlighted areas of confidence and opportunity. Staff expressed high confidence (86%) that DHCD is well-positioned to attract and retain the talent needed to deliver on its goals, offering a promising readiness to tackle a top priority. Nonetheless, responses from the Board and Staff on the questions below show a clear opportunity to improve these processes ahead of new resources, programs, and personnel on-boarded.

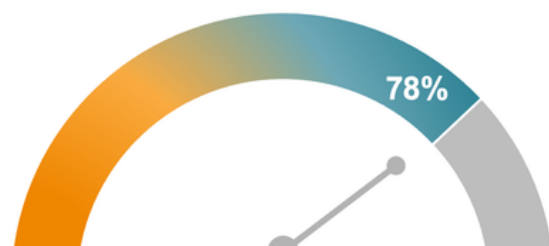
Effective Processes

Q: “DHCDs’ working processes are clearly documented and communicated across teams and functions”.
(Staff only)



Board Knowledge Continuity

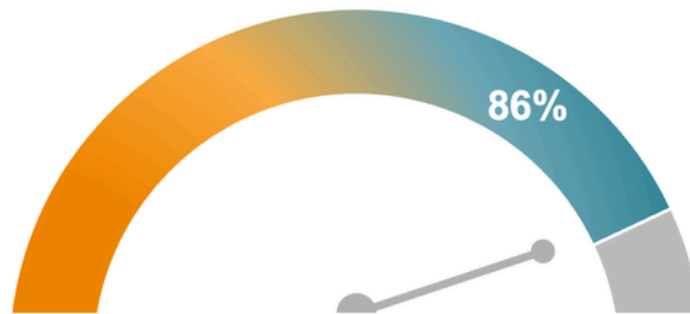
Q: “Board members are well-informed to ensure continuity and knowledge transfer when new members join”.
(Board only)



DHCD's continued growth depends on maintaining its reputation as a responsible and transparent steward while building the operational foundation needed to support larger-scale impact. By proactively investing in people and process alignment, the District can scale responsibly and ensure that increased resources translate into measurable, sustainable community outcomes.

Talent Attraction and Retention

Q: "I believe DHCD is well-positioned to attract and retain strong talent and resources that are and will be needed to fulfill its goals".
(Staff only)



Recommendation:

- Consider recommendations outlined by the RGS (Regional Government Services) HR Assessment Report - particularly Recommendations #8 & #11
 - There should be emphasis on assessing internal capacity and staffing needs to align resources with anticipated growth in funding and grantmaking. Prioritize hiring roles that enhance fiscal oversight and data analysis.
- Strengthen operational infrastructure by documenting and streamlining core processes across departments to ensure consistency, efficiency, and knowledge transfer as the organization grows.
- Develop a comprehensive marketing and talent strategy to attract and retain high-performing staff, while reinforcing DHCD's reputation as an employer of choice and trusted community partner.

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Embedding Financial Strategy for Sustainable Growth

The influx of new funds from the Tenet Lease Agreement positions DHCD to play an even greater role in advancing health and equity across the Coachella Valley. With this expanded capacity comes heightened responsibility to manage resources strategically, maintain public trust, and ensure investments translate into meaningful, measurable community outcomes. Survey responses indicate high confidence from the Staff and Board (~94%) that DHCD manages its public funds responsibly and transparently, offering a solid foundation on which to build long-term sustainability and expanded impact.

The lack of a clear financial pillar in the current strategic plan is a critical gap that could hinder DHCD's ability to achieve long-term sustainability. The first prioritization exercise with staff identified financial planning and having an investment strategy as top priorities for the new plan, emphasizing the need to balance accessibility with growth, establish clear fiscal parameters, and ensure sustainable funding for programs and ventures.

“Establishing clear criteria and transparent decision-making helps balance flexibility with strategic alignment, ensuring equity and fidelity to the mission.”

The **Financial Sustainability Analysis Document** outlines projected resources, assumptions, and considerations over the next 30 years to guide DHCD's long-term planning and fiscal strategy.

Recommendation:

- Establish a dedicated Financial Sustainability Pillar in the new strategic plan to provide a clear roadmap for long-term growth and resource management.
- Align financial planning with organizational capacity, ensuring that expanded activities are supported by the necessary human resources, systems, and tools.

PESTLE ANALYSIS

It is essential to recognize that the DHCD does not operate in a vacuum but rather in an environment that continually evolves and fluctuates. As we move deeper into the strategic planning phase, it is imperative to have a pulse on the forces shaping the context of both the organization and the residents of the Coachella Valley. The Soven team chose to conduct a PESTLE analysis to generate a snapshot of the current context.

A PESTLE analysis is a framework used to examine the external factors (Political, Economic, Social, Technological, Legal, and Environmental) that shape an organization's operating environment. It helps identify the broader forces that influence strategic choices, present risks, and open up opportunities. A PESTLE analysis is an essential step in building a five-year strategic plan that is realistic, resilient, and responsive to community needs. By systematically mapping the external landscape, we can enhance DHCD's understanding of the pressures and trends that will affect health access, equity, and organizational sustainability in the Coachella Valley.



The political landscape surrounding healthcare in the Coachella Valley is marked by volatility, funding uncertainty, and shifting representation. From federal policy proposals to local congressional redistricting, these changes will directly shape DHCD's ability to protect and promote health access and equity for the Coachella Valley.

The One Big Beautiful Bill is perhaps the largest political threat to impact the Valley in the coming years. With an estimated \$1 trillion in Medicaid cuts, 10–12 million coverage losses nationwide, and rollbacks to ACA subsidies, the bill risks driving uninsured rates sharply upward in Riverside County, where Medi-Cal already covers over 256,000 people, or 34% of the population. (California Health Care Foundation) In the Coachella Valley's high-risk zip codes, residents are 57% more likely to be uninsured than those in lower-risk areas; this gap will likely grow even wider beginning in 2027 as a result of the OBBB. (Huron Report) Hispanic families, who already face uninsured rates 20–30% higher than white residents, would bear the brunt of these cuts, with ripple effects on maternal and child health, chronic disease management, and reliance on overburdened emergency rooms, where avoidable visits are already 44% higher in high-risk areas. (Huron Report) Provider shortages, which are currently estimated at more than 263 physicians, would be further strained by reduced financial incentives to practice in the Valley and new limits on medical education loans, slowing efforts to recruit and retain a diverse workforce. (CVEP Report)

Other policy shifts deepen these pressures. Proposed NIH funding cuts and increased political influence over research priorities threaten California's position as the nation's largest recipient of biomedical research funding. (The Atlantic) Universities like UCLA and UC Riverside, whose partnerships extend into the Coachella Valley, face reduced capacity for research, training, and clinical trials, raising the likelihood that they will seek greater financial support from philanthropic organizations and regional health districts such as DHCD. At the same time, heightened immigration enforcement and anti-immigrant rhetoric have created widespread fear, with data showing clinic no-show rates climbing from under 10% to more than 30% in some communities and nearly a third of undocumented immigrants avoiding health or social programs altogether. (The Guardian)

For the Coachella Valley, where immigrant labor is central to the economy, these dynamics translate into delayed care, untreated conditions, and rising mental health needs. Meanwhile, at the state level, California's CalAIM initiative is expanding Medi-Cal to cover social determinants of health and strengthening managed care integration. (DHCS) Yet while CalAIM creates opportunities for state-funded support in areas like housing and nutrition, it also poses challenges relating to ensuring local providers are equipped to deliver new services and that residents can access them equitably.

Feedback from DHCD partners collected in the survey issued by Soven reinforced these political concerns, underscoring how federal and state policy shifts are already affecting residents' daily lives. Particular concerns that were repeated include the loss of insurance coverage for underserved populations, the impact of immigration policies on access to care, and widening inequities between the eastern and western parts of the Valley. Grantees are already approaching DHCD with funding requests tied to anticipated reductions from the Big Beautiful Bill, citing early impacts on program capacity, client reach, and staffing. There is widespread fear throughout the Valley that reductions to Medi-Cal and nonprofit funding will place added strain on the entire healthcare safety-net, as well as general anxiety over deportation risks and reduced protections for marginalized groups. These community and partner insights affirm that political volatility will have a deep impact on budget and regulations and direct consequences on barriers to care.



E**Economic**

Broader economy's health and its impact on your organisation. This includes inflation rates, economic growth, exchange rates.

The economic landscape for healthcare in the Coachella Valley is defined by shrinking reimbursement margins, rising operating costs, and deepening workforce shortages - pressures compounded by broader regional challenges. Elevated interest rates, rising housing costs, and limited affordable housing supply strain both residents and healthcare workers, making it harder for providers to recruit and retain staff. These intertwined economic and housing dynamics reinforce persistent financial and access pressures for providers and communities alike.

Healthcare providers in the Coachella Valley face mounting financial strain as reimbursement rates fail to keep pace with inflation. Medicare payments have dropped 33% since 2001 (adjusted for inflation), and Medicaid pays only about two-thirds as much as Medicare for primary care.(AMA) This gap discourages providers from serving Medi-Cal and Medicare patients and threatens the long-term viability of safety-net clinics that serve high-risk populations. Financial stress is also increasingly being felt by residents: as of 2024, roughly 1 in 10 adults in California reported problems paying their own or a household member's medical bills in the past year (California Health Interview Survey, 2025).

Rising costs from supply chain disruptions and tariffs add further pressure. Tariffs could cost the health system between \$10 million to \$25 million a year, and with 75% of U.S. medical devices produced overseas, hospitals could see costs increase by up to 15%, creating budget stress for clinics nationwide and uncertainty in procurement. (HealthcareDive, Premier) At the same time, a projected shortage of more than 250,000 behavioral health professionals nationwide, compounded locally by the lack of bilingual providers, may further exacerbate existing shortages and limit access for immigrant and underserved residents. (Health Resources & Services Administration)



Though they've decreased since 2023, interest rates in California remain elevated, with the 30-year fixed mortgage rates hovering around 6.48%(Bankrate). Despite high borrowing costs in California, the Coachella Valley market is seeing growing inventory, and leverage is slowly shifting towards buyers. (KW Coachella Valley) In terms of housing and real estate, the East/West divide remains stark. The West Valley continues to attract investors and luxury demand and includes cities among the hottest markets in California.(NBC Palm Springs) Meanwhile, the East Valley continues to face higher rates of rent burden (spending more than 30% of their monthly income on rent), racial and economic segregation and struggles with affordability constraints. (Center for Community Investment) Housing insecurity, a critical social determinant of health, is also on the rise: the share of California adults who worry about paying rent or mortgage increased from 15.1% in 2021 to 19.9% in 2024 (California Health Interview Survey, 2025).

Amid these challenges, cross-sector collaborations are creating opportunities. While a decade ago the Coachella Valley produced just 38 units of affordable housing a year, the Valley is becoming an example to California with a large-scale initiative spearheaded by Lift to Rise to add an additional 10,000 affordable units in the Valley by 2028 across all 9 desert cities. While the full impact remains to be seen, this project offers a promising opportunity to improve the health and well-being of Coachella Valley residents. (Los Angeles Times) Additionally, the growth of social impact investment offers a promising impact. With more philanthropic and private capital seeking measurable, place-based outcomes, DHCD is well-positioned to attract co-funding for health infrastructure and community priorities.





The Coachella Valley is incredibly diverse, with its residents representing variations in ethnic, demographic, and socioeconomic characteristics. Over half of the District's residents identify as Hispanic, with this proportion rising in High-Risk communities. (Huron Report) The Valley's complex landscape is characterized by a set of social dynamics that deepen health disparities and strain local systems.

Social patterns in health-seeking behavior also shape outcomes. Men, who live about five years less than women, are less likely to seek regular care and therefore face higher mortality from nearly all leading causes of death. (New York Times) Limited time with overburdened primary care doctors compounds this, leaving gaps in prevention and screening. Rising mental health needs add another layer of urgency. Four in ten U.S. high schoolers report persistent sadness or hopelessness, one in five have considered suicide, and young adults face the highest burden of mental illness. (CDC) Older adults, particularly men over 75, face some of the highest suicide risks. (CDC) In the Coachella Valley, suicide rates already exceed county and national averages, with Rancho Mirage four times the state average. (CNHA) These trends underscore the need for culturally adapted, community-based approaches to mental health across both younger families and older populations.

Recent immigration enforcement actions have further created an additional layer of social stress for many Latino families. Research from California's Central Valley found that recent ICE raids coincided with a 22 percent increase in daily student absences, with particularly large spikes among the youngest students. (Brown University) Given the Coachella Valley's large Latino population and history of immigration enforcement activity, similar dynamics likely affect local students. Reduced school attendance limits access not only to education but also to school-based health and nutrition services, while heightening anxiety, trauma, and social isolation within families.



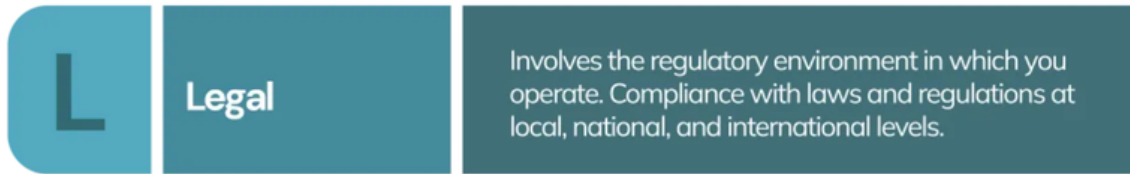


Technology is reshaping how care is delivered, but in the Coachella Valley, significant gaps in digital access limit its potential. Broadband, for years, has always been, and continues to be, a significant challenge Valley-wide. The East Valley in particular faces more limited internet and smartphone access as well as lower rates of digital literacy and participation in digital healthcare. These inequities mean that even as care delivery evolves, many residents remain excluded from its benefits.

Telehealth has become a vital tool since the pandemic, with California legislation extending payment parity through 2026 so providers are reimbursed equally for virtual and in-person visits. (CCHP) Yet usage is 6% lower in Coachella Valley's high-risk zip codes, reflecting barriers in broadband, digital literacy, and trust. (Huron Report) For some, particularly immigrant families, telehealth reduces fear of public exposure and expands access. But if payment parity lapses, providers may scale back offerings, leaving rural and underserved residents with fewer options.

AI adoption in healthcare is accelerating, from medical scribes that reduce clinician paperwork to generative AI supporting documentation, coding, and diagnostics. While investment is strong, regulatory gaps and uneven funding trends create uncertainty. For the Coachella Valley, AI offers potential to ease workforce shortages and improve efficiency, but only if deployed equitably and with safeguards. Similarly, remote patient monitoring (RPM) opens new pathways for managing chronic diseases like diabetes and hypertension from home. Because Medicare and Medi-Cal reimburse RPM, it could strengthen care for residents with limited clinic access—provided programs are adapted for multilingual use and supported with stronger broadband infrastructure. (DHCS)





As one of more than 70 local healthcare districts in California, DHCD operates under a unique layer of state-mandated governance requirements in addition to broader federal and national healthcare laws. This means compliance, equity, and transparency are not only legal obligations but also central to how the District fulfills its public mandate. For DHCD, this translates into ensuring that both the District and its funded partners provide culturally and linguistically appropriate services and maintain accessible facilities and programs.

At the state level, AB 2019 reshaped how healthcare districts operate, particularly around grantmaking and governance. In response to more than one-third of California's health care districts closing or selling their hospitals and moving towards health related services including clinics and education as well as a trend towards grant giving rather than providing direct health care services (about one-fifth of HCD) - Districts must now publish annual grantmaking policies, outline transparent application and review procedures, and publicly disclose all recipients of funds.(Lakeconews) They can no longer solicit or award grants outside of these processes, creating stricter rules designed to prevent misuse of public dollars.

Recent developments underscore the stakes of these regulations. The Palo Verde Healthcare District, which operates the Blythe-based Palo Verde Hospital, has filed for Chapter 9 bankruptcy protection amid ongoing financial instability that could result in the hospital's closure. Given its geographic proximity to DHCD's service area, such a closure could increase patient demand on nearby facilities and reinforce the importance of maintaining fiscal health and compliance within the healthcare district system. (Becker's Hospital Review)

Compounded with rising public oversight of special district funds and participatory budgeting, expectations around transparency and accountability will be raised, as well as DHCD's ability to demonstrate how funds advance equity and measurable outcomes. Legal compliance is therefore both a safeguard and a strategic necessity for maintaining legitimacy and community trust.



The Coachella Valley faces mounting environmental pressures that directly affect health and equity for residents. Record-breaking heat waves are projected to grow so extreme that parts of the Valley could see over 200 days above 90 degrees by mid-century. (PHI) From 2013–2023, extreme heat contributed to 143 deaths locally, underscoring the urgency. (AP News) Poor air quality compounds the problem: the Valley consistently ranks among the nation's worst for PM10 particulates, stirred up by wind, construction, and the drying Salton Sea. Seniors, children, and farmworkers bear the greatest risks, with elevated rates of respiratory and cardiovascular illness. (PBS) These environmental exposures are not just background conditions but critical social determinants of health—shaping who gets sick, who recovers, and who faces long-term health burdens. For many residents, where they live and work determines their baseline vulnerability, making environmental health inseparable from broader equity outcomes.

Water insecurity adds another layer of risk. The Colorado River faces deepening shortages, with post-2026 agreements uncertain, while Lake Mead is projected to hit record lows. (SF Gate) Though California's senior water rights have spared it from the harshest cuts so far, the future remains precarious. Locally, the Salton Sea has lost over one-third of its volume in the past 25 years, exposing toxic playa that worsens air quality. For communities near the Sea, this means higher respiratory risks, reduced access to safe water, and economic instability as farmworkers face income loss tied to agricultural water reductions. (ESA) These realities place environmental health squarely at the center of DHCD's strategic priorities.

These threats are driving demand for climate-responsive infrastructure. Initiatives like the Shade Equity Master Plan and Riverside County's cooling-center network demonstrate how shaded spaces, green infrastructure, and emergency supports can reduce environmental stress and protect vulnerable communities.(KDI, Riverside County) The Salton Sea Management Program's dust-control projects also aim to reduce PM exposure, though implementation remains a challenge. (Salton Sea Management Program) For DHCD, the opportunity lies in funding and scaling these types of interventions to protect health while advancing resilience.

STAKEHOLDER MAPPING

THE BOARD



What are their needs

- A clear, measurable, and actionable plan aligned with mission, fiduciary duty, and visible community outcomes.
- Tangible, high-visibility wins (e.g., clinics, infrastructure projects) that demonstrate impact to constituents.
- Alignment between Board, staff, and community priorities to strengthen credibility and trust.

What are their fears

- Reputational damage, loss of influence, or failure to deliver visible results.
- Federal/state policy shifts undermining funding or district authority.
- Missing key community needs.

What data to they need to see

- SMART goals with quantifiable KPIs (health, equity, access) supported by benchmarks and baselines.
- Financial performance and transparent tracking of resource allocation.
- Qualitative community impact stories and satisfaction metrics that reinforce public trust.

How will the new 5-year Strategy affect them

- Clarifies long-term direction and defines measurable priorities.
- Strengthens governance, transparency, and accountability.
- Enhances credibility and provides a platform for demonstrating leadership and public value.

LEADERSHIP



What are their needs

- Respect, trust, and recognition for staff expertise and contributions.
- Clear, consistent policies and governance practices that the Board upholds.
- Long-term commitment to addressing systemic public health issues rather than short-term fixes.

What are their fears

- Loss of program momentum or funding because of shifting Board priorities.
- Not being able to live up to being good stewards of new funds.
- Short termism and progress on public health issues not resulting in long-term change.

What data to they need to see

- Evidence of sustained program impact and community outcomes over time.
- Metrics demonstrating efficiency, staff retention, and program continuity.

How will the new 5-year Strategy affect them

- Provides organizational stability and a unified roadmap that reinforces leadership authority.
- Strengthens alignment between staff and Board
- Enables sustained investment in long-term public health outcomes.

THE STAFF



What are their needs

- Clear communication, direction, and coordination across teams.
- Recognition for contributions, including behind-the-scenes and operational roles.
- Opportunities for professional growth and advancement as new funding expands capacity.

What are their fears

- Being excluded from key decisions or overshadowed by Board dynamics.
- Burnout or strained capacity as responsibilities grow with new grants and initiatives.

What data to they need to see

- Transparent communication on organizational priorities, goals, and progress.
- Measurable community outcomes.

How will the new 5-year Strategy affect them

- Clarifies organizational priorities and expectations, improving alignment and efficiency.
- Creates clearer pathways for growth and leadership development.
- Provides stability and structure that supports both performance and well-being.
- Presents a need for increased staffing and support for organizational growth.

COMMUNITY RESIDENTS & VOTERS



What are their needs

- Affordable, culturally competent, and geographically accessible healthcare services, including more evening and weekend hours.
- Clear understanding of DHCD's role and how property tax dollars are used.
- Awareness of services facilitated by DHCD and how to get better care.

What are their fears

- Loss of healthcare access due to policy changes or Medicaid cuts.
- Immigration enforcement or deportation fears preventing access to care.
- Economic instability, rising costs of living, and unaffordable health services.

What data to they need to see

- Clear, public-facing data on community health outcomes by ZIP code.
- Transparent reporting on how funds are used and which neighborhoods benefit.
- Accessible, bilingual updates on programs, services, and progress.
- Demonstrable evidence of improved access, affordability, and local impact.

How will the new 5-year Strategy affect them

- Builds trust and awareness of DHCD's mission and tangible community value.
- Strengthens transparency and accountability through clearer communication and visible results.
- Reinforced confidence that DHCD is a proactive, equity-driven steward of community health.

LOCAL AND STATE GOVERNMENT



What are their needs

- Visible, measurable health and equity outcomes for the residents they serve.
- Alignment between DHCD priorities and regional or state policy goals.
- Partnership and funding opportunities that demonstrate collaboration and impact.
- DHCD participation in regional committees on issues like air, water, and housing.

What are their fears

- Funding uncertainty, budget constraints, and political scrutiny.
- Reputational damage from transparency or performance issues.
- East/West Valley divides hindering regional cooperation.

What data to they need to see

- Shared outcome metrics for health, equity, and funding leverage.
- Evidence of effective cross-agency collaboration and regional impact.
- Public-facing results they can communicate to constituents.

How will the new 5-year Strategy affect them

- Opportunity to strengthen alignment and regional coordination.
- Enables joint wins and shared visibility on pressing issues facing the region.

HEALTHCARE OPERATORS & PROVIDERS



What are their needs

- Meeting their bottom line: financial stability through patient volume, favorable payer mix, and funding support.
- Recruitment and retention of qualified providers, supported by affordable housing and quality-of-life factors.
- Collaboration with DHCD on workforce development, facility investment, and community outreach.

What are their fears

- Medicaid/Medi-Cal cuts increasing uninsured rates and ER overuse.
- Workforce shortages or provider attrition due to cost-of-living barriers.
- Hospital closures in neighboring HCDs overwhelming their capacity and resources.

What data do they need to see

- Patient access, utilization, and satisfaction metrics.
- Workforce pipeline and provider recruitment data.
- Improved health outcomes for Coachella Valley residents.

How will the new 5-year Strategy affect them

- Expands collaboration opportunities and potential funding partnerships.
- Supports workforce pipelines and equitable access initiatives.
- Helps stabilize the healthcare ecosystem amid policy and funding shifts.

GRANTEES

**What are their needs**

- Stable, multi-year, mission-aligned funding with flexibility to address emerging community needs.
- Clear, consistent funding priorities and transparent communication from DHCD.
- Streamlined grant processes that minimize administrative burden and support limited staff capacity.

What are their fears

- Funding cuts jeopardizing the health of their organization.
- Workforce shortages and limited organization capacity to manage growing demands.
- Climate-related or economic pressures increasing costs and community needs.

What data to they need to see

- Transparent grant criteria and impact dashboards showing funding alignment and outcomes.

How will the new 5-year Strategy affect them

- Brings stability, transparency and predictability to grantmaking.
- Encourages partnership and shared impact across the nonprofit ecosystem.
- Enables expansion or adaptation of programs to better serve community needs.

COMMUNITY PARTNERS



What are their needs

- Cross-sector collaboration and resource pooling to achieve larger, place-based impact.
- Joint projects that deliver visible local benefits and align with health, education, and infrastructure goals.
- Predictable, mission-aligned funding partnerships that support long-term planning.

What are their fears

- Shrinking municipal budgets, economic volatility and implications of new political policies around funding and immigration.
- Competing agendas or political dynamics undermining collaboration.

What data to they need to see

- Measurable community outcomes tied to joint initiatives.
- Evidence of how DHCD investments strengthen local economies and resident well-being.

How will the new 5-year Strategy affect them

- Opportunity to formalize partnerships and foster shared accountability.
- Aligns city and school district goals with health and equity outcomes.
- Encourages joint planning, co-investment, and greater regional impact.

ACADEMIC & EDUCATIONAL PARTNERS



What are their needs

- Strong education-to-employment pipelines connecting students to local healthcare careers.
- Funding and partnerships to expand training, internships, and clinical placements.
- Support for student well-being and accessible on-campus health resources.

What are their fears

- “Brain Drain” as graduates leave the region due to limited local opportunities.
- Funding shortfalls, especially related to Title IX or program-specific grants.

What data to they need to see

- Workforce pipeline metrics (internships, residencies, job placements).
- Impact data showing how education investments improve regional health equity.

How will the new 5-year Strategy affect them

- Strengthens workforce development and expands local training pathways.
- Positions education as a core pillar of health equity and regional resilience.
- Fosters long-term collaboration between DHCD, schools, and healthcare providers.

SWOT ANALYSIS

We complete our discovery report with a SWOT analysis that synthesizes DHCD's strategic position. This framework highlights the organizational strengths DHCD can leverage and the critical weaknesses it must address as it enters the strategic planning process.

STRENGTHS

- Strong Financial Standing/no outstanding debt
- Influx of cash from the new lease agreement
- High-performing organization
- Talented and Committed Staff and Board
- Visible projects: particularly the mobile clinics
- Trusted partner in the community

WEAKNESSES

- Broad number of Strategic Goals
- Strategic Pillars vs Activities delineation is lacking
- Lack of community impact measurement
- Brand Awareness
- Internal collaboration between Staff and Board

- Scale investments and community health with increased budget
- Increase brand awareness by capitalizing on increased visibility from Ballot AA where residents voted on the hospital lease
- Becoming top financial steward in the Coachella Valley
- Ensure financial sustainability for the long term.

- Shifting political climate/Big Beautiful Bill
- Diverse community needs
- Staff capacity constraints with increased funding
- Increased public financial scrutiny due new influx of funds
- Increased number of grant requests

OPPORTUNITIES

THREATS

NEXT STEPS

The next phase of this project is to collaboratively develop a focused, actionable, and measurable 5-year strategic plan. We will engage in 4-6 Board Workshops to align long-term vision with organizational priorities, capacity, and community health outcomes.



V1 STRATEGIC PLANNING ACTIVITIES

A series of workshops with the Board to co-design a strategic plan and long-term vision that aligns with DHCD's mission and vision. This will be designed to promote open, respectful, inclusive, and goal-oriented dialogue. The actionable recommendations from the Discovery phase will serve as the foundation to these workshops.

- 4-6 Board Strategic Planning Workshops
- Design & Schedule Community Sessions

V1 STRATEGIC PLANNING DELIVERABLES

- V1 of the FY 2027-2031 Strategic Plan
- Community Session Action Plan

ACKNOWLEDGEMENTS

We are grateful for the opportunity to have learned about DHCD over the last few months. This Discovery process has been enriching and informative thanks to the openness, candor, kindness, and thoughtfulness of the DHCD Staff, Board and community partners. We appreciate your support and partnership and look forward to beginning this next phase of strategic planning.

