

# 2025 Community Impact Report

***We believe all people have a desire— and a basic human right — to be well.***



alliancehf.org

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# Dear Friends and Partners,

As I look back on this past year, I feel both proud and deeply grateful. What stands out most are the moments when we took bold steps together, like our decision to transfer 10% of our endowment, \$7.5 million, to the Imperial Valley Wellness Foundation, entrusting community leaders with the resources to shape their own future.

We also leaned into the urgent challenges facing young people's mental health. By lifting up the growing concerns around smartphones and social media, and by investing in practical, evidence-based care, we've helped spark real momentum for change. At the same time, we made important strides in housing, investing at every level of the continuum and helping to preserve and create more than 700 affordable and workforce homes. And, we supported local approaches to economic mobility, including guaranteed income pilots that offer foster youth and Latinas more pathways to stability and opportunity.

When crises hit—whether the devastating floods in South San Diego or sudden federal actions impacting nonprofits and immigrant communities—we showed up. Sometimes that meant grants or technical support, but just as often it meant being there in person, listening, and responding alongside community.

All of this work is rooted in one belief: everyone deserves the chance to be well. As we look ahead, I'm excited to keep building a future where that's possible, where equity and community leadership guide the way. Thank you for being on this journey with us—we couldn't do it without you.

Sincerely,

**Sarah Lyman**  
Executive Director



# Recent Accolades



**TRUST Award of  
Excellence in Philanthropy**  
From The Nonprofit Institute, USD

Pictured: AHF Board and Staff

**Impact Partner Award**  
From 2-1-1 San Diego/CIE

Accepting on behalf of AHF: AHF Trustee  
Elizabeth Dreicer with Bill York,  
CEO, 2-1-1 San Diego



**Outstanding Community  
Funding Partner**  
From San Diego Home Start, Inc.

Pictured:

Steven Ephraim, President of Board Home Start;  
AHF Trustee Alethea Arguilez (accepting on behalf of AHF);  
Laura Tancredi-Baese, CEO Home Start



# Shifting Power & Resources

## A New Era of Philanthropic Giving in Imperial Valley

In 2025, AHF made a bold and unprecedented move by transferring \$7.5 million —10% of its endowment—to the Imperial Valley Wellness Foundation (IVWF), a locally governed, community-led foundation serving one of California's most underfunded and under-resourced regions. This historical capital shift reflects AHF's belief that the people closest to the challenges are best positioned to lead the solutions. Rather than another grant cycle, this endowment transfer provides long-term financial autonomy for IVWF to invest in civic infrastructure, local leadership, and community-driven priorities.

This investment not only advances rural equity in a region often overlooked by philanthropy, but also signals a larger shift in AHF's approach: from traditional grantor to true partner. By relinquishing control and trusting in community leadership, AHF hopes to inspire other funders to reimagine how wealth, power, and trust can be shared to create lasting change.



# Advancing Behavioral Health

## Youth Behavioral Health

In response to the dramatic increases in mental health challenges and the severity among young people, AHF is providing leadership and funding in three specific areas:

- Addressing issues related to smart phone/social media use among young people and the strong correlation with high levels of anxiety and depression.
- Investing in systems-change solutions to clinical care pathways that can increase quality, effectiveness and access to behavioral healthcare.
- Working with regional leaders and experts to better understand the current and potential youth behavioral health ecosystem, and identify core priorities for advocacy and investment.

AHF sponsored **The Anxious Generation** lead researcher Zach Rausch to speak at three major events, including at the 2024 Live Well Advance with more than 2,000 attendees. Every participant received a copy of the book, with cost shared by the Prebys Foundation. Since the event, many school leaders have taken further steps to inform and engage educators, parents, and students around interventions geared toward effective solutions to smart phone and social media use.



As a follow up in this movement, AHF co-sponsored with County Live Well San Diego a program called "Youth Mental Health, Smart Phones & Social Media." Participants discussed how schools can limit smartphone use to support student well-being, and shared strategies and challenges.

AHF is helping launch **CETA Global** in more than three clinical settings—integrated care, outpatient behavioral health, and school-linked services. CETA Global is an evidence-based intervention that expands access and improves the quality of behavioral health care. This initial investment is designed to spark transformative change in San Diego's behavioral health system. Initial training will kick-off for phase 1 providers this fall.



# Expanding Housing Solutions

## Transforming Lives Through Impact Investments in Affordable Housing

Housing is not just a necessity but a cornerstone for health, economic stability, and community well-being. Yet, the San Diego region faces an unrelenting crisis as one of the least affordable places to live in the United States. Decades of economic and population growth have outpaced housing production, leaving an estimated gap of over 170,000 affordable housing units, according to the San Diego Association of Governments (SANDAG).

To address this urgent need, AHF has stepped forward as a catalytic partner in the housing continuum through its grantmaking and impact investment portfolio. With a focus on marginalized and low-income populations, AHF has forged partnerships with developers, funders and other aligned partners to invest in diverse housing solutions—from rental housing for the homeless to programs supporting first-time homebuyers and middle-income workforce families. Within the last few years, AHF's investments have helped protect and build more than 726 units of critically needed housing stock for the San Diego region.

### HOUSING IMPACT BY THE NUMBERS

PROJECT	TYPE OF HOUSING	FOCUS POPULATION	# OF UNITS
<b>Hilltop Encanto</b>	New construction, home ownership	First-time homebuyers, 150% AMI and below, Southeast SD	49 homes
<b>Market Street Village</b> (Community Solutions Large Cities Project)	NOAH preservation, rent-reduction for low-income tenants, net-new homeless housing	Homeless veterans, low-income renters below 80% AMI, Central SD	229 units
<b>Middlemarch Fund III: Goldilocks</b>	New construction, rental	"Missing Middle" renters between 80%-100% AMI, Central SD	70 units, 31 <100% AMI
<b>Casa Familiar San Ysidro: Avanzando Community Land Trust</b>	New construction, rental, transition to home ownership, community-governed	Very low income 30%-50% AMI households, San Ysidro	103 units
<b>Yes, In God's Backyard (YIGBY)</b>	New construction, rental	Homeless population, Faith based land in Southeast SD	26 units
<b>Hillside Project</b>	New construction, mixed income rental	40% of units for 50%-80% AMI in mixed-income community	249 units

**726 units**



## Housing for Homeless Veterans

In 2024, AHF partnered with Community Solutions, BD Impact Real Estate, and BQuest to acquire Market Street Village, securing 229 units for long-term affordable housing, including up to 100+ units that will be dedicated for veterans exiting homelessness. The remainder are deed restricted at affordable rents for residents earning 80% AMI or below. Had this property been purchased by a for-profit developer, rents would have increased dramatically, forcing out lower-income residents. Instead, Market Street Village remains permanently affordable—preserving critical housing stock in a city where affordable units are rapidly disappearing.

The impact is twofold:

- Preventing future homelessness by keeping vulnerable residents housed
- Expanding housing access to those currently experiencing homelessness



Market Street Village

## A Pathway for Working Families

Also completed in 2024, the Hilltop-Encanto project provides 49 units of "missing middle" workforce housing for families earning 120-150% AMI. The vast majority of buyers are first-time homebuyers, and many received critical built-in down payment assistance, enabling them to achieve homeownership and build long-term economic stability.

AHF funding supported a first-time homebuyer assistance program in collaboration with other funders and developers.

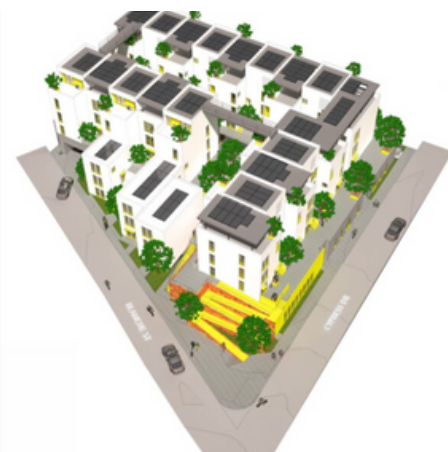


Hilltop Encanto

## Innovative Homeownership Models

Almost completely funded, the Casa Familiar SanYsidro Avanzando Community Land Trust (CLT) project will include 103 housing units for individuals earning 30-50% AMI. This groundbreaking initiative, supported by AHF's early feasibility funding, will utilize a lease-to-own model within a CLT framework, enabling very low-income families to transition into homeownership while preserving long-term housing affordability.

Designed as a resident-governed approach, this project ensures perpetual affordability and empowers families to build wealth and stability for future generations. Casa Familiar is working with local developer Ginger Hitzke to deliver on this long-held vision for the San Ysidro community.



Casa Familiar CLT

## Expanding “Missing Middle” Housing

Breaking ground in early 2025, the Middlemarch Fund III “Goldilocks” project will add 70 new rental units to the San Diego housing market, with 31 units deed-restricted for “missing middle” renters earning between 80-100% AMI. AHF played a crucial role as an early investor, helping to catalyze more than \$2 million in additional impact funding for this Central San Diego development. This initiative bridges the gap for workforce renters who earn too much to qualify for housing subsidies, but too little to afford skyrocketing market rents.



Middlemarch Fund III

## Harnessing Faith-Based Land for Housing

The YIGBY (Yes In God’s Backyard) project is a shining example of creative land use, leveraging faith-based property to create 26 new rental units for homeless individuals. AHF supported this initiative with a grant during its early development phase, demonstrating its commitment to innovative solutions for housing scarcity.

New tenants move in Fall 2025.



YIGBY

## A Vision for Mixed-Use Communities

Also launching this year is a collaborative investment in a 249-unit, mixed-income apartment development located in a federally designated Opportunity and Promise Zone near downtown San Diego.

Blending low- and middle-income housing together at scale creates thriving neighborhoods for stable, affordable housing while fostering cross-class interaction which research shows is crucial for improving social mobility.



Hillside Project

## The Global Policy Leadership Academy: Shaping the Future of Affordable Housing

AHF has engaged with the Global Policy Leadership Academy (GPLA) to support the launch of its "Community of Practice," a systems-focused initiative to identify new opportunities for increasing mixed-income housing, emphasizing urban planning, construction innovation, financing strategies, land management, and community engagement.





## Promises2Kids

Through our Economic Mobility & Security portfolio, AHF provided support along with other local funders to Promises2Kids to launch their Foster Futures program, a wrap-around approach with guaranteed income to stop the cycle of homelessness that impacts approximately one-third of youth aging out of foster care.

There are promising pathways to public support, and this local pilot will build upon statewide efforts with additional data to demonstrate outcomes. We can't wait to share more soon!



## The Latina Upward Mobility Initiative (LUMI)

AHF provided seed funding for the Latina Upward Mobility Initiative (LUMI), a pilot project by MANA de San Diego. LUMI takes a culturally relevant, multi-systems approach to addressing the social determinants of health affecting Latinas in San Diego County, with a focus on workforce development and wealth generation.

In addition to unrestricted monthly cash assistance, LUMI provides comprehensive services to low-income Latinas, particularly parents and caregivers in MANA's Hermanitas and College Success programs. Services include education, coaching and mentorship aimed at preparing the selected individuals for careers that will support their wealth development. The goal is to change the life trajectory of participants and foster intergenerational growth for entire families by helping Latinas pursue fulfilling careers and achieve economic stability. This initiative represents a significant advancement in MANA's mission to empower Latinas toward upward mobility and an improved quality of life.

Through initiatives like LUMI, Alliance Healthcare Foundation is committed to fostering economic mobility and improving health outcomes for underserved communities in San Diego.

# Supporting the Safety Net

## Commitment to Collaboration and Multi-Year Core Operating Support

We are honored to stand alongside 34 incredible community partners in the second year of our three-year **Mission Support** grant cycle. By providing multi-year, unrestricted funding, we aim to reduce red tape and offer the kind of stability that allows mission-driven organizations to focus on what matters most: serving their communities.

Rather than relying on traditional, time-consuming grant reports, we stay connected through meaningful one-on-one check-ins and active participation in community events. And because our partners asked for more opportunities to connect, we hosted grantee convenings that sparked new relationships, shared learnings, and cross-sector collaborations. When we invest in trust and long-term partnership, the entire social sector grows stronger.



# Building Capacity for Systems Change

We view Capacity Building as a catalyst for systems change—an intentional strategy to leverage limited resources in service of greater, lasting impact. A cornerstone of our approach is to “grow the pie” by equipping community-based organizations with the tools, partnerships, and support needed to attract and mobilize outside investment into San Diego.

Our Capacity Building program is aimed at empowering local leaders, like [Mundo Gardens](#) and [Casa Familiar](#), to drive solutions rooted in community priorities. These initiatives demonstrate the power of community engagement, equitable development, and strategic resourcing in creating sustainable, people-centered systems that build wealth, wellness, and resilience across the region.

## Mundo Gardens: Green Corridor Project

Mundo Gardens leads the National City Southeast Greenspace Corridor Project, also known as the “Green Corridor,” with funding support from AHF used for planning and pre-development. The initiative addresses key health and economic challenges in South and Central San Diego, including poor air quality, lack of housing, limited access to healthy food, exercise, and transportation, as well as economic instability. These factors contribute to chronic diseases like pulmonary conditions, diabetes, and cancer, leading to premature deaths for nearly 60% of the local population.



The project aims to establish a regional community advisory group focused on housing, wellness, culture, workforce development, and active mobility. AHF’s support supplements initial funding from the Community Connectors Program, led by Smart Growth America, which promotes community-driven transportation infrastructure projects to mitigate the impact of historically divisive urban planning. The Green Corridor will work toward improving community health, economic stability, and environmental conditions by fostering inclusive development and mobility initiatives.





## Casa Familiar: Avanzado San Ysidro – Community Land Trust

Community engagement is essential for ensuring development projects align with residents' needs and priorities. In San Ysidro, where multiple large projects are underway, ongoing engagement is crucial for success. This process requires time and resources to build relationships, train leaders, collect input, and implement feedback.

AHF funding supports major projects, including the Avanzado San Ysidro – Community Land Trust (ASY-CLT), a 103-unit mixed-use development featuring affordable housing, commercial spaces, and climate-resilient design. The CLT model ensures permanent affordability, prevents displacement, and fosters wealth-building. Groundbreaking is expected in 2025. Once completed, a majority resident-led board will govern ASY-CLT.

Additionally, Casa Familiar has acquired 40,000 square feet along San Ysidro Blvd. for a future mixed-use project incorporating commercial space, housing, and community services. Resident input is crucial in shaping this space, determining the types of housing, businesses, and services needed.

AHF funding helps support effective community engagement efforts to ensure these projects reflect the community's vision, creating lasting benefits for residents while addressing affordability and economic stability.

# Empowering Community-Driven Innovation

## Transformational Solutions to Longstanding Challenges

### Innovation Initiative (i2) \$1 Million Milestone-Based Challenge Grant

One of the most efficient ways we can support population health improvement is by helping innovations succeed, scale and achieve sustainability. We believe that your zip code, race, socioeconomic status, gender or ability should not determine your life expectancy. Through the i2 program, we help nurture and scale sustainable solutions aimed at closing gaps in health equity.



The 13th i2 cycle began in January 2025. It is a capacity-building and mentorship program that includes up to 9-months of entrepreneurial education and customized mentoring through a partnership with global business accelerator, Nex Cubed, culminating in a milestone-based \$1 million award which we anticipate making in late fall.

Through i2, AHF continues to drive sustainable, community-led solutions in health and wellness.

## 2022 i2 Awardee Updates

### Project New Village (PNV)

Developing a Good Food District Hub to expand access to healthy fresh food in Southeastern San Diego as part of a broad-based movement to build social equity and healthy neighborhoods. AHF's grant supports pre-development which is on track, and over 50% of the required capital has been raised. Recently, PNV was recognized by CA's Jobs First Initiative which will award them \$500k.



### Urban Restoration Counseling Center (URCC)

Expanding the Therapy for ALL program to provide low-cost mental health services to underrepresented communities and train student clinicians to serve the BIPOC population.

With AHF's support, URCC has diversified and grown its revenue streams, trained more than 37 clinicians from underrepresented populations, and served well over a thousand individuals, couples, and families with culturally relevant, quality behavioral healthcare.





# Deepening Community Engagement

## Centering Community Voice Across Our Work

Throughout 2024, we deepened our commitment to community engagement by creating multiple pathways to amplify local voices and strengthen our connection to the communities we serve. Regional community convenings, co-hosted by CBOs with deep ties to East, South, Central and North San Diego, created space for honest dialogue focused on their community needs, potential solutions, and shared priorities. These conversations culminated in a cross-regional gathering where over 40 diverse community leaders came together to reflect on common themes and surface ideas for lasting change.

### Community-Based Partners



Central Region



East Region



South Region



North Region





## Key Themes from Community Engagement Meetups

### 1. Addressing Basic Needs

- There is a persistent lack of access to essential services, including healthcare, food, and housing.

### 2. Public Health and Environmental Resilience

- Recognizing environmental and climate resilience as critical public health issues is essential.

### 3. Cultural and Linguistic Accessibility

- Services across all sectors—mental health, education, and crisis response—must be culturally sensitive and linguistically accessible.

### 4. Community Empowerment

- Strengthening communities through collaboration, resource sharing, and advocacy is key to fostering long-term solutions.

# Supporting Community Health Workers

## Neighborhood Networks

Through a jointly funded project with Price Philanthropies, San Diego Foundation, and AHF, Neighborhood Networks conducted a robust analysis of the facilitators and barriers to sustaining the Medi-Cal Community Health Worker (CHW) workforce. The findings reveal critical challenges in financial viability – particularly the mismatch between required billable encounters and actual workflows – and highlight promising opportunities to strengthen CHW programs. Early recommendations include blended funding models, policy improvements, and workflow innovations that can help ensure long-term sustainability and maximize the impact CHWs have in their communities.





**“IN TIMES OF IMMEDIATE  
NEED, WE’RE PROUD TO BE  
ABLE TO RESPOND WITH  
URGENCY, FLEXIBILITY AND  
HEART.”**

**Sarah Lyman**  
Executive Director  
AHF

## Acting Swiftly to Provide Rapid Response & Support

### 2024 January Floods

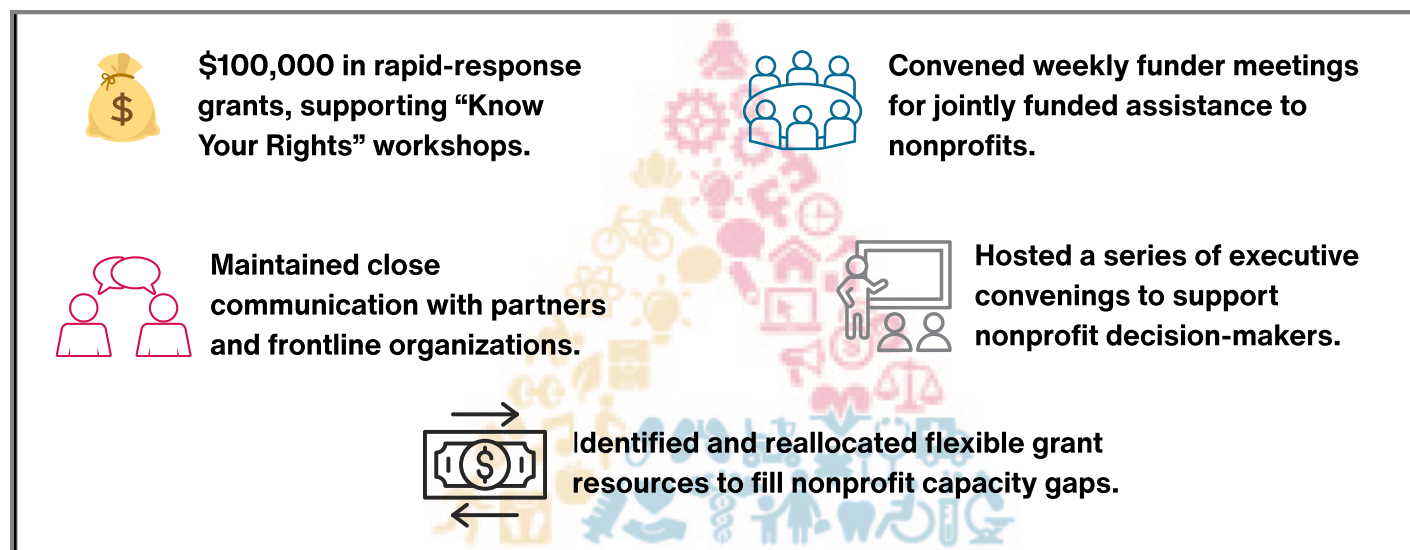
When severe flooding struck San Diego on January 22, 2024, many communities were left reeling, and initial responses from public agencies fell short. In that critical window, local philanthropy moved quickly to fill the gap.

At AHF, we're proud to have responded with urgency, flexibility, and heart. Team members – most notably Barbara Orozco-Valdivia, Vice President of Programs and Community Partnerships – were on the ground daily, listening, lending a hand and doing whatever it took to meet immediate needs, whether that meant coordinating with local agencies or securing supplies directly from big-box stores.

Thanks to this real-time insight and rapid coordination, AHF delivered \$100,000 in emergency funding to grassroots organizations working closest to those most impacted. This response wasn't just about dollars, it was about showing up, standing alongside community, and acting with care when it mattered most.

### 2025 Impact of Federal Actions

In response to sweeping federal actions affecting the non-profit sector, AHF has mobilized quickly to provide strategic support, responsive funding, and technical assistance. Our efforts are focused on helping organizations navigate scenario planning, legal implications, shifting priorities and funding disruptions.



*“The workshops Alliance provided—especially around contingency and budget scenario planning—were invaluable. They gave us the tools we needed to weather the storm and come out stronger.”* - **Arthur Soriano**, Youth Empowerment

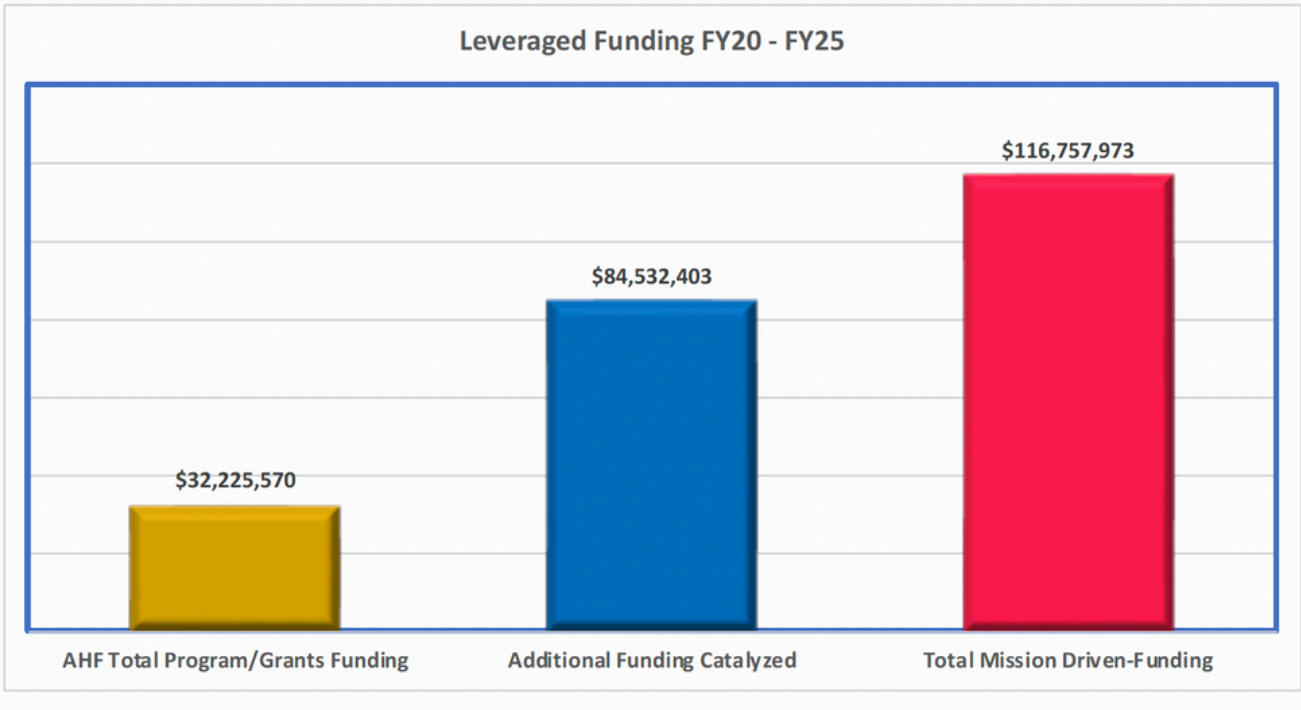
# Multiplying Our Impact

The chart below illustrates how AHF has leveraged its funding over the past five years to attract additional capital and partnerships into San Diego.

While we are a lean foundation, we focus on catalyzing broader change, bringing attention, partners, and new dollars into San Diego to help strengthen community-driven solutions.

This often means helping unlock additional funding by bringing new funders to the table, championing under-recognized ideas, or stepping in early to de-risk promising work so others can follow. We don't do this alone. These efforts are always rooted in collaboration with others, but we take seriously our role in helping move good ideas forward and ensuring San Diego communities are not overlooked.

Through this approach, we've helped catalyze **\$84 million in additional funding** for social impact efforts across the region.





## Impact Investing

In addition to our grantmaking, we also work to activate significant portions of our endowment to bring missing capital in the form of debt or equity financing to projects that advance our mission in San Diego. Through our impact investments, we can generate greater social return than is possible with our grantmaking dollars alone.



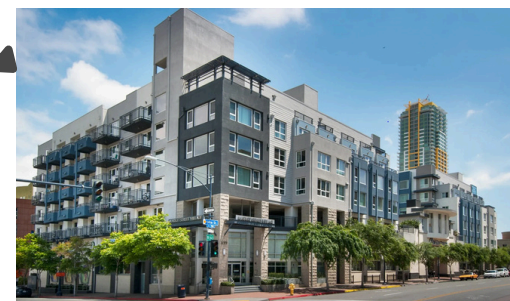
**Founders First**



**Middlemarch III**



**Market Street Village**



*"Thank you for being the catalyst to our work with San Diego!"*

– **Rosanne Haggerty**, Community Solutions and Large Cities Fund

# Meet Our Team

Dear Friends,

At Alliance, we envision a region where equitable health resources lead to universal health and well-being. We work to advance health and wellness for the most systemically marginalized and under-resourced communities in San Diego and Imperial counties.

We advance this work through funding, convening and advocacy with other funders, nonprofits, social enterprises, government and community agencies. And, we believe that solving our most intractable health and equity challenges requires a bold, intentional and sustained effort in collaboration with others.

As a board, we are always learning and asking, “how can we do things better”? For the past several years, we’ve been on a journey to more explicitly advance racial equity; improve how we anchor community voice in our work, and focus more deeply on upstream social determinants of health.

I’m proud of our organizational culture of learning and innovation. On behalf of my fellow trustees, we invite you to think and act boldly with us in pursuit of a more equitable and just society.

Sincerely,

**Dale Fleming**  
Board Chair





## **Board of Trustees**

- **Dale Fleming** - Board Chair; (retired) Strategy Director, County of San Diego Health and Human Services Agency
- **Ilene Klein, M.D.** - Vice Chair; President, Krysalis Consulting, LLC
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- **Elizabeth Dreicer** - CEO, Kuity
- **James Beaubeaux** - Former CFO/COO for San Diego County Medical Society
- **Jeffrey Willmann** - Senior Vice President of Innovation, Med Data Quest
- **Joe Ramsdell, M.D.** - Distinguished Professor Emeritus of General Internal Medicine at University of California, San Diego
- **Julianne R. Howell, Ph.D.** - Senior Health Policy Advisor, County of San Diego Health and Human Services Agency
- **Killu Sanborn, Ph.D.** - Managing Director at Oxford Finance
- **Robert B. McCray, J.D.** - Chair Elect of the HIMSS Enterprise Board of Directors

## **Committee Members**

- **Adolfo Ventura** - Vice President & Chief Programs and Operations Officer at MAAC
- **Alex Waters** - Executive Director of The Program Labs
- **Deborah M. Higgins** - President of Higgins Capital Management, Inc.
- **Elizabeth (Lisa) Cuestas**, Chief Executive Officer of Casa Familiar
- **James Howell, CFA, CTP** - Chief Financial Officer of The San Diego Foundation
- **Kim Davis King** - Partner with San Diego's Launch Factory
- **Roque Barros, Jr.** - Executive Director of Imperial Valley Wellness Foundation
- **Shannon Nelson** - Vice President, Investment Stewardship at BlackRock, Inc.
- **Sydney Thomas** - Founder & General Partner of Symphonic Capital

## **Staff**

- **Sarah Lyman** - Executive Director
- **Arthur Roke** - CFO and Chief Investment Officer
- **Erin Graham** - Controller
- **Barbara Orozco-Valdivia**, Vice President, Programs and Community Partnerships
- **Karen Winston** - Director, Communications & Special Initiatives
- **Jawad Al Baghdadi** - Operations Manager
- **Melanie Mijares** - Program Associate
- **Joshua Mbugua** - Fellow, Impact Investment

# Looking Ahead

In times like these, when the nonprofit sector is stretched, and communities are facing compounding challenges, we hold tightly to what drives us: **the belief that every person has the right to be well.**

A truly healthy community means everyone has the opportunity to reach their full potential, no matter their background, resources, or identity. That vision remains out of reach for too many, especially in marginalized and under-resourced communities. But together, we are working to change that.

As we reflect on the past few years, we're deeply grateful for your partnership, your resilience, and your shared commitment to health and wellness. Our work is far from over, but we move forward with hope—standing tall with you.

Let's continue building a future where wellness, dignity, and opportunity belong to all.





We envision a San Diego and Imperial County region where equitable health resources lead to universal health and wellbeing, and we strive to reduce – and ultimately eliminate – disparities across all social determinants of health.

[alliancehf.org](http://alliancehf.org)

