

2022: Year In Review

Annual Report

Metta Fund

Joy
Well-Being
Justice
Elders
Advocacy
Connection
Dignity
Equity
Health
Care
Rights
Aging



Contents

- 3 CEO Message
- 4 About Metta Fund
- 5 Our Approach
- 6 Trust-Based Grantmaking
- 8 Racial Equity
- 12 Investing in Advocacy
- 14 Spotlight: Mujeres Unidas y Activas
- 16 Spotlight: Hand in Hand: The Domestic Employers Network
- 18 Spotlight: CARA Education Fund
- 20 Grantmaking
- 22 California's Master Plan on Aging: Year 2
- 24 Metta Fund Leadership Award
- 26 Narrative Change
- 28 2022 Grants List
- 29 Board of Directors and Staff
- 30 Acknowledgments

Reimagining Our Futures



Dear Partners,

We are pleased to present Metta Fund's 2022 annual report. This year's report celebrates changemakers and advocates and highlights the incredible work of our grant partners, who are bringing much needed visibility to the issues facing today's elders.

Please enjoy reading more about our partnership work, our approach, and our grantmaking. With deep appreciation, we are putting the spotlight on three advocacy partners elevating the elder voice and advocating for a better tomorrow. As we continue to recover from the pandemic, we believe that the voices of elders and community leaders will bring us all together to recognize that we are stronger together when we are all thriving.

This past year, elders have continued to face unprecedented challenges as economic and racial inequity, and the residual impact of the pandemic, has persisted in our region. At the same time, our nation's rapid demographic shift has challenged our systems in tremendous ways and millions of people continue to age into poverty. While great strides have been made in California, these alarming circumstances highlight the need for additional support for older adults not only in the Bay Area, but across the nation.

We're clear on the challenges we're facing right now—from the shortage of caregivers to housing to access to healthcare to social isolation. These issues don't lend themselves to easy answers.

But it's also clear that progress can—and must—start with us. We have to advocate and organize; to advance our values; and collaborate to improve systems and services. We have an opportunity to re-imagine our futures – together.

No matter what tomorrow holds, we remain committed to growing, learning, and adapting in pursuit of a more inclusive and equitable society – where all can thrive and age with dignity and joy. I look forward to continuing this important work with all of you in 2023 and beyond.

In Partnership,

Janet Y. Spears
Chief Executive Officer
Metta Fund

Advancing Equity in Aging



Metta Fund is a private foundation dedicated to advancing the health and wellbeing of San Francisco's growing older adult population. Through grantmaking and community partnerships, Metta Fund prioritizes areas where systemic transformation is needed to address health inequities – because everyone deserves to live a healthy life, at every age.

As the first and only private foundation in Northern California with a population focus on older adults, we work in partnership with nonprofits, community groups, and city and state government on special initiatives that advance racial justice and address critical issues facing elder communities.

Since our founding in 1998, we have provided nearly \$87 million in grants through our strategic programs, collaborations, and initiatives.

Our Approach

Trust-Based Grantmaking

Racial Equity

Collaboration

Advocacy

Capacity Building & Leadership Development

Learning

Narrative Change

Trust-Based Grantmaking

Metta Fund's strategic grantmaking is aimed at supporting both proven strategies and innovative approaches to providing the care and support that the older adult population needs.

We provide multi-year, unrestricted general operating support wherever possible—to give organizations the flexibility to use our funding where it's needed most. We hope that with the help of flexible funding, our grant partners and their communities are better equipped to make the seismic changes we all wish to see.

Our equity grantmaking is structured under the two interconnected focus areas of elder caregiving and social connectedness. As a San Francisco-based foundation, we primarily support local organizations focused on communities of people who are consistently excluded from influencing the decisions that shape their lives and futures.



“ Since Metta Fund’s inception 25 years ago, we’ve grown alongside our community. With the exponential changes of our region, we are facing new challenges. As our work evolves, which it must, we are deepening our trust and commitment with the aim of shifting power back to our community.”

– Jarmin Yeh, Metta Fund, Board Member



Racial Equity

San Francisco and the greater Bay Area has long been home to Indigenous, Black, Latinx, Asian, and other communities of color, who have played vital roles in the social, cultural, political, and economic development of the area.

Yet, systemic racism and segregation have caused significant disparities, and today we continue to witness rampant displacement and economic inequity built upon a history of exclusion and dispossession. Elders from these communities have been particularly impacted because a lifetime of inequity is compounded in old age. The case for racial equity in aging has never been stronger.

To make meaningful impact and advance equity in aging, we believe that we must be both explicit and unequivocal in our long-term commitment to advancing racial equity – and being antiracist – in all that we do. Metta Fund’s staff, board, and partners are dedicated to building just and thriving communities, and to providing trust-based support to the bold strategies and leadership that are required to bring about major change in our lifetime.



Ohlone Way mural in San Francisco by Josué Rojas



Kimberly Brandon

Board Chair, Metta Fund

What does racial equity mean to you?

To me, racial equity is a vision, a journey, and a process. It's the journey of learning and unlearning. It's the process of eliminating racial disparities and improving outcomes for everyone. And it is the intentional and continual practice of changing policies, practices, systems, and structures by prioritizing real and measurable change in the lives of people of color.



Why do you think Metta Fund's commitment to racial equity is critical?

As a funding institution, but more importantly, as a learning institution, Metta Fund is well-situated to lead the way. We sit at the intersection of philanthropy, advocacy, and community changemaking, and our voice matters.

I think of Metta Fund as an investor in racial equity. And because of that investment, more Black and brown-led organizations are being funded, supported, and sustained. Here in San Francisco, that's critical.

Lauren Pongan

National Director, Diverse Elders Coalition

Why do you think Metta Fund's commitment to racial equity is critical?

Metta Fund's commitment to racial equity is critical because they're working towards setting the bar for the ways that philanthropy can make significant investments in under-resourced and often ignored communities who want to bring community-driven solutions to scale. We need funders like Metta to lead the way for other funders to embrace trust-based philanthropy practices, if we want to see real change.



Investing in Advocacy

Society's issues are complex and interconnected, and the systems of care do not work for everyone. A growing number of elders, especially elders of color, are aging into poverty after experiencing barriers in educational opportunities, employment prospects, housing, and a variety of other areas. In partnership with our grantees, we are taking an expanded big picture perspective – looking at how causes and effects from various components of a system have caused dysfunction and many times, even failure.

At Metta Fund, we believe that the people closest to an issue are closest to the solution. This includes community groups who are serving and working with the older people most adversely impacted by inequities. Grant partners see firsthand how systems stand in the way of the health and well-being of elders. Along with more traditional support of direct programs and service activities, we believe in investing in advocacy, community organizing, and movement building.



Members of Mujeres Unidas y Activas at a training retreat.



Mark Wang for Fine Acts x OBI

Mujeres Unidas y Activas

In the United States, immigrants often work strenuous and stressful jobs in the food industry, as day laborers, in construction, or in agriculture. Many more work as long-term caretakers or domestic workers; especially immigrant women. And while elder caregiving is one of the most overlooked issues facing our nation, an entire demographic of mostly immigrant women upholds this industry – but the country does not extend the same courtesy to them.

[Mujeres Unidas y Activas](#) (MUA), a well-known Bay Area organization in the national domestic worker movement and Metta Fund grantee, is seeking to change this. MUA's efforts and initiatives, created by and for Latinx women and bolstered by a powerful cadre of programs that tackle immigration reform, women and workers' rights, pursues social and economic justice for their Latinx members at home and in the world. MUA, which translates roughly to "unified and engaged women," believes that women are stronger together. Through a demonstrated model of leadership development, MUA facilitates the metamorphosis of its members into agents of change.

Part of their programming includes intensive leadership training for participants to learn about campaign advocacy skills, including how to tell their own stories that could sway those in the capital. Current legislative wins include the California Domestic Worker Health and Safety Act and the SF Domestic Worker Paid Sick Leave Ordinance, both of which MUA is working hard to now see implemented.

The women who work as caretakers will also, inevitably, join the ranks of elders. But who will take care of our caretakers?



Juana Flores, MUA Executive Director



MUA community outreach



MUA member meeting



Maria Carrillo, MUA staff member

Hand in Hand: The Domestic Employers Network

People are living longer than ever, and most of us will need care at some point. Yet, a shortage of paid workers, significant long-term care costs, and lack of social insurance is fueling a long-term crisis for elder care. At the same time, caregiving has historically been undervalued and underpaid due to a history of racial and gender disparities.

To address these compounding challenges, and so that caregivers can be supported and valued with a living wage for their work, Metta Fund partners with grantees like [Hand in Hand: The Domestic Employers Network](#) (HIH).

Hand in Hand is the only national organization in the country that works to increase job quality and dignity for domestic workers through strategic initiatives targeted toward the individuals who employ them. As part of the California Domestic Workers Coalition, HIH works on creating a portable benefits program so that domestic workers can access the paid sick days they are entitled to, but rarely receive. A portable benefits system for paid time off would ensure domestic workers can access the benefits they deserve.



Kayla Shore, (HIH staff); Russell Rawlings (HIH CA Education Organizer), and Helia Daigeau (Elder & Disability Justice Organizer and HIH member) outside the Sacramento Board of Supervisors office after a successful board meeting to educate the members on the importance of homecare. Photo by Jean Melesaine.



In California, HIH has focused efforts on a *Long-Term Services and Supports (LTSS) for All Grassroots Coalition* to increase access and affordability of home and community-based services for older adults and people with disabilities. These efforts directly impact elders and their access to care while also creating good jobs for home care workers.

This year, HIH is most proud of campaign wins that demonstrated the power of workers and employers coming together to create policy and culture change for more equitable care systems. Aligned with Metta Fund's caregiving priority, HIH has been organizing and winning campaigns to improve the In-Home Supportive Services (IHSS) homecare program in California.

Throughout 2022, HIH gathered throughout the Bay Area and beyond with IHSS homecare recipients and key labor allies and providers to organize, educate, and advocate for higher wages for publicly funded IHSS workers. Better wages for providers mean better care for homecare recipients and workers.

**Hand in Hand: The Domestic Employers Network is fiscally sponsored by Bend the Arc*

CARA Education Fund

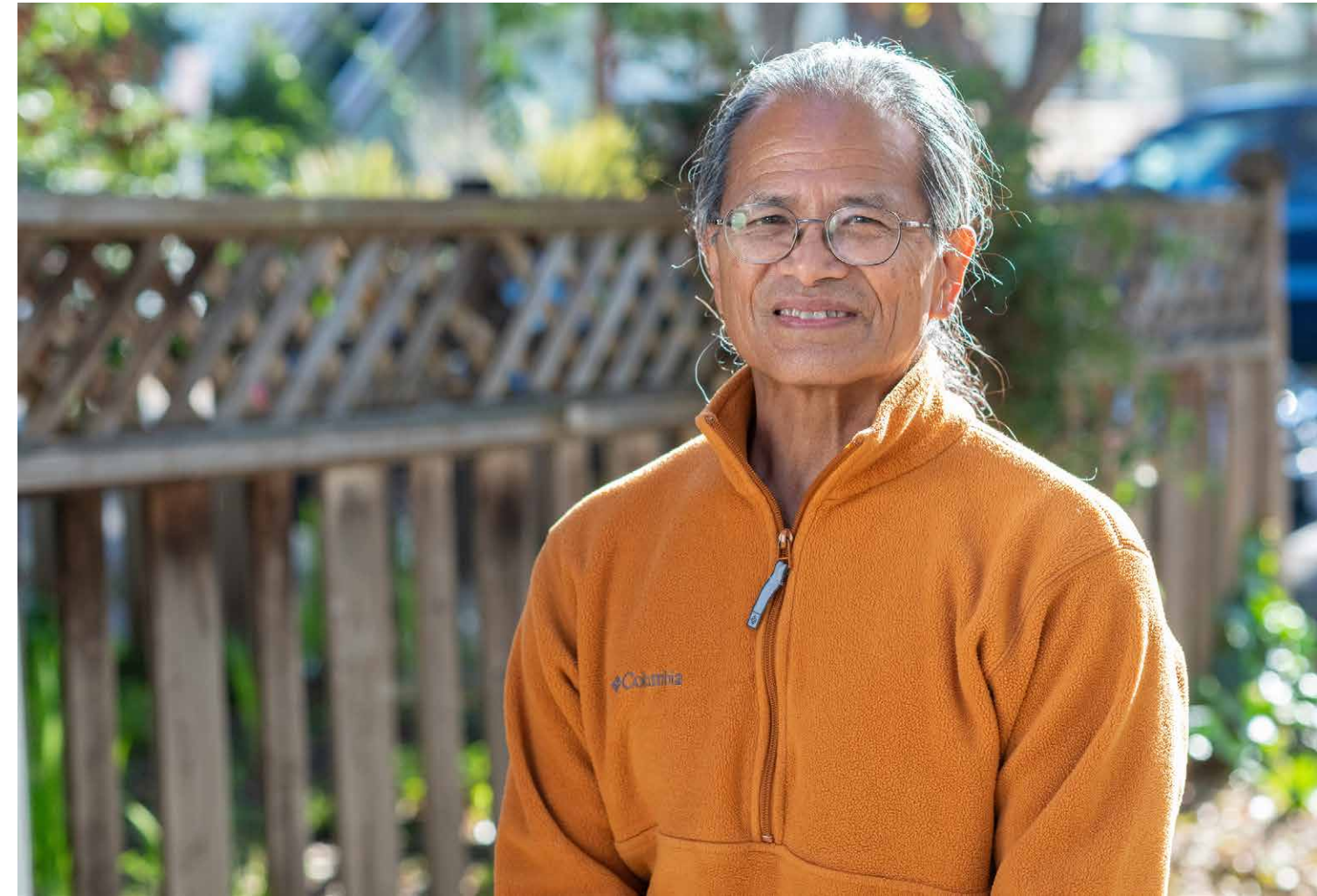
To expand power in historically under-represented communities, Metta Fund partners with advocacy grantees like the [California Alliance for Retired Americans \(CARA\)'s Education Fund](#). A statewide non-profit, CARA is a grassroots elder advocacy organization that unites retired workers and community groups to fight for social and economic justice, civil rights, and a better, more secure future.

For the past 16 years, the CARA Education Fund – the educational arm of CARA – has provided training, education, and leadership development programs for older adults in California. Through this approach, CARA aims to increase grassroots leadership, build alliances, and develop a strong community organizing model to bring a powerful elder voice to the table.

In alignment with Metta's priorities, CARA focuses on educating and organizing older adults to engage in systems change activities, using an equity lens. Amongst a variety of programs, CARA Ed Fund provides educational and advocacy trainings and 17 monthly, regionally-based chapter meetings (CATs) to keep members engaged on critical issues and policies that directly affect them.



Pauline Brooks, CARA President and Sandra Johnson, Vice President



Dee Rosario, CARA Ed Fund Board Director

“All elders deserve to retire and live in dignity. We are leaving our seniors behind and that’s not right.”

- **Dee Rosario**, Board Director, CARA Ed Fund

During the height of the pandemic CARA was able to influence key decisions such as crisis care standards, protesting the state’s practice of sending folks from acute care to nursing homes; helped develop vaccine protocols; and engaged

older adults to inform the Master Plan on Aging – now helping to implement some of the recommendations in that plan. These efforts changed the conversations and helped to refocus and prioritize the needs of older adults in California.

Grantmaking

Advancing Health & Equity in Aging

\$3.1 M Granted

PURPOSE	AMOUNT
Social Isolation and Loneliness	\$1,745,000
Caregiving	\$782,500
Advocacy	\$445,000
Equity & Leadership Development:	\$127,500



California's Master Plan for Aging: Year 2

In January 2021, Governor Newsom released California's Master Plan for Aging (MPA), which lays out a ten-year plan to prepare the state for an aging and changing population. The MPA set five major goals: Housing for All Ages and Stages; Health Reimagined; Inclusion & Equity, Not Isolation; Caregiving that Works; and Affording Aging.

In its first two years of implementation, the MPA has driven the comprehensive solutions needed to address the state's most persistent challenges. Considerable progress on all five bold goals was made this past year. Accomplishments include more than \$100 million invested in creating more residential care options for older adults and people with disabili-

ties; the nation's first Dementia Care Aware program; and more than \$17 million invested to close the digital divide. These achievements are possible thanks to partnerships with state agencies, the Legislature, Governor's Office, philanthropy, and the private sector.

Looking ahead, the state's priorities for 2023-24 can be accessed here. Over the next two years, the California Department of Aging will award \$4.5 million in grants to up to 36 local communities across the state to help launch their own aging- and disability-friendly action plans. Still, there is significant need to continue expanding support for aging communities. We invite you to join us.

“The results we achieved together...such as unprecedented investments in affordable housing with supportive services, health care access for all undocumented Californians aged 50 and above, and more than \$2 billion for the workforce — are due to our shared commitment to the populations uplifted in the MPA: older adults, people with disabilities, and family caregivers.”

– Mark Ghaly, MD, MPH, California Health and Human Services Secretary



Metta Fund Leadership Award

In October 2022, we announced long-time community leader Sandy Mori as the recipient of the 2022 Metta Fund Leadership Award.

For over five decades, Ms. Mori has served and advocated on behalf of the people of San Francisco through various roles including Co-Founder of Kimochi Inc., San Francisco Health Commission Executive Secretary; Co-Chair of the Board of the San Francisco Long Term Care Coordinating Council (LTCCC); and Chair of the Japantown Taskforce among others. She was the first Asian American woman to chair a city commission – the Commission on the Status of Women; and has been a trailblazer, renowned organizer, and well-loved community leader for years.

“Sandy’s fierce dedication to equity and improving the lives of older adults – alongside her tireless organizing efforts – helped create and fund the San Francisco Dignity Fund,” said Metta Fund Chief Executive Officer, Janet Y. Spears. “Our city is better prepared for our aging population because of her work.”

A celebratory award reception, which included taiko drumming and a performance by renowned artist Brenda Wong Aoki, took place at Hotel Kabuki in San Francisco’s historic Japantown.

The Metta Fund leadership award program was created in 2021 to recognize the work of community leaders who have made outstanding contributions to improving the quality of life for older adults in San Francisco and beyond.



Sandy Mori and Janet Y. Spears, Metta Fund CEO

Narrative Change

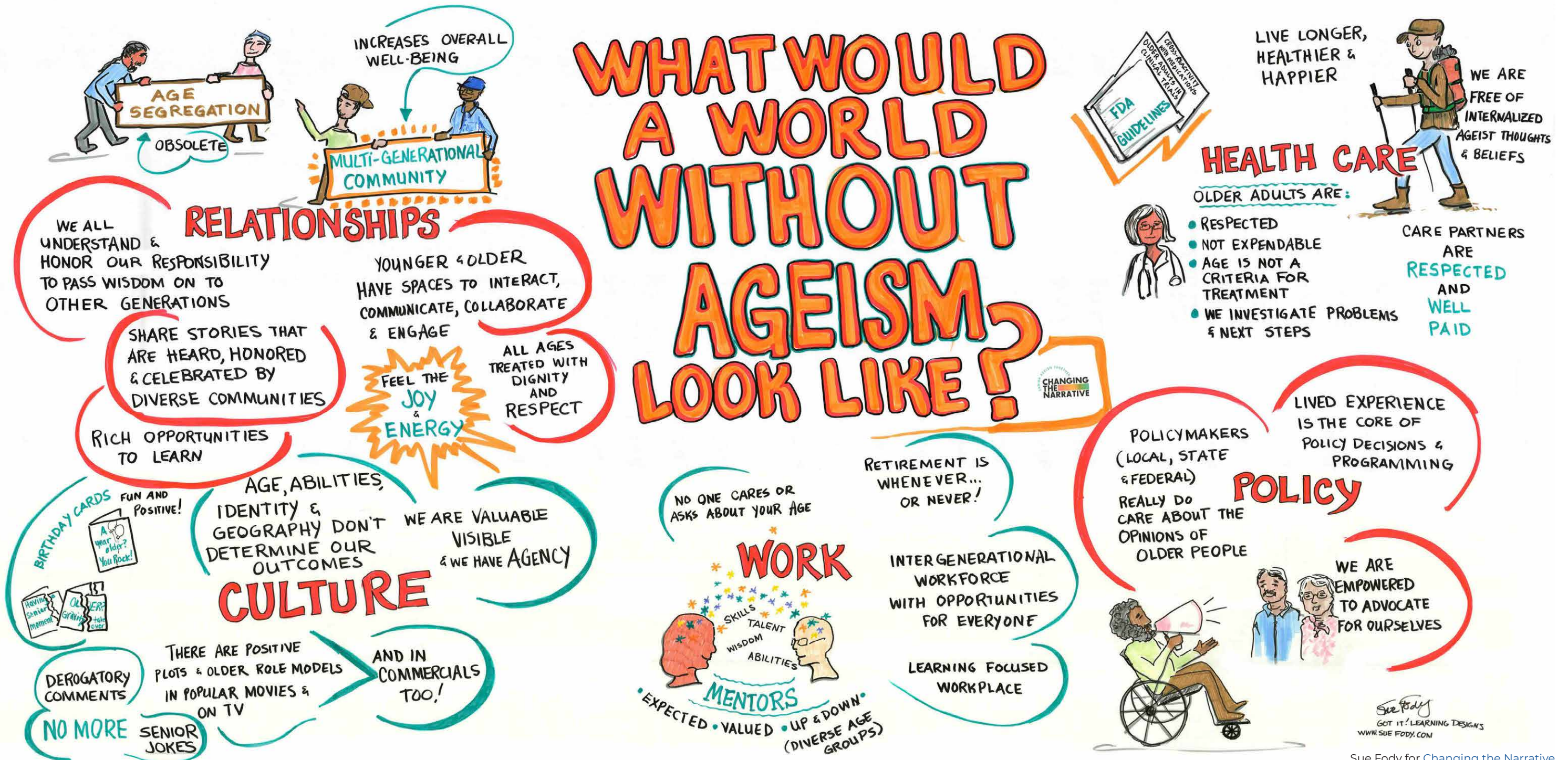
Our words matter, and ageist mindsets, language, and systems hurt us all.

To begin to confront the injustice of ageism, we need to change the narrative around aging; because changing the way we talk will change hearts and minds – ultimately helping to advance policies and programs that support us at every stage of life.

Here at Metta Fund, we know that elders contribute to our society every day. And together with our partners, we are seeking to change the narrative in support of equitable aging – our future selves will thank us.

What can we all do to end ageism?

WHAT WOULD A WORLD WITHOUT AGEISM LOOK LIKE?



Sue Fody
GOT IT? LEARNING DESIGNS
WWW.SUEFODY.COM
Sue Fody for [Changing the Narrative](#)

List of Grants

We gratefully acknowledge the following 2022 grant recipients

American Society on Aging (Rise Fellows)
 Bayview Hunters Point Multipurpose Senior Services
 Bayview Hunters Point YMCA
 CARA Education Fund
 Caring Across Generations*
 Catholic Charities
 Children's Council of San Francisco
 Chinatown YMCA
 Community Living Campaign
 Community Tech Network
 Curry Senior Center
 Diverse Elders Coalition*
 Faithful Fools Street Ministry
 Family Caregiver Alliance
 Felton Institute
 Five Keys Schools and Programs
 Front Porch Communities Foundation (Well Connected Español)
 Golden Gate University (Women's Rights Employment Clinic)
 Hand in Hand: The Domestic Employers Network*
 Homebridge
 Institute on Aging (Friendship Line)
 I.T. Bookman Community Center
 Jewish Home and Senior Living Foundation
 Justice in Aging
 Kimochi, Inc.
 La Casa de las Madres
 Little Brothers Friends of the Elderly
 Mabuhay Health Center*
 Meals on Wheels of San Francisco
 Mission Neighborhood Centers, Inc.
 Mission YMCA
 Mujeres Unidas y Activas
 Northern California Grantmakers
 Openhouse
 PRC
 Samoan Community Development Center
 San Francisco Interfaith Council
 San Francisco Neighborhood Centers Together*
 San Francisco Pretrial Diversion Project
 San Francisco Senior and Disability Action
 San Francisco State University Foundation
 Self-Help for the Elderly
 Shanti Project
 SteppingStone Adult Day Health Center
 The SCAN Foundation (Master Plan for Aging)
 UCLA Center for Health Policy Research, University of California, Los Angeles
 Walk San Francisco Foundation

*Fiscally sponsored

Board of Directors

Metta Fund is governed by a board of directors, chaired by civic leader Kimberly Brandon



Kimberly K. Brandon



Sonia Melara



Roma Guy



John Woodward



Joseph Hafey



Jarmin Yeh



James Loyce

[See the full profile of each board member](#)

Staff



Janet Y. Spears
Chief Executive Officer



Helen Huynh
Controller



Catherine Collen
Senior Program and Grants Officer



Anna Karrer Manley
Director of Communications



Renée Espinoza
Director of Program Strategy



Mimi Kelly
Program and Grants Associate



Brigitte Garcia
Director of Administration



Cheryl Puyot
Administrative Assistant

Acknowledgments

PHOTOGRAPHY

Sahara Borja
Jean Melesaine
Hasain Rasheed
Mark Shigenaga

EDITOR

Anna Karrer Manley

GRAPHIC DESIGN

Morphos

A VERY SPECIAL THANK YOU to all the people who shared their stories and posed for our cameras. All photography was captured with a focus on the health, safety, and dignity of our subjects.

SPECIAL THANKS TO CARA Education Fund; Hand-in-Hand: The Domestic Employers Network; Mujeres Unidas y Activas; Josué Rojas; Lauren Pongan, National Director, Diverse Elders Coalition; Changing the Narrative; Fine Acts

Join Us



MettaFund.org

Stay Informed

- Learn more about issues affecting today's elders
- Subscribe to our newsletters
- Follow us on social @mettafund



Metta Fund



101 Montgomery St, Ste 2200

San Francisco, CA 94104

info@mettafund.org
