

Regional Portfolio Design

Project Overview

What is the Focus? With support from the Robert Wood Johnson Foundation and the Rippel Foundation, this action-learning project will design the next generation of tools and processes for stewards who want to shape sound investment priorities to produce more equitable health and well-being in regions across the country.

Why is it Needed? Well-established “[conditions for systems change](#)” underscore that resources must flow in new ways; and those allocation decisions also challenge people to embrace new mental models, relationships, power dynamics, policies, and practices. Furthermore, Phases 3 and 4 in ReThink Health’s [Pathway for Transforming Health and Well-Being](#) focus on “Building an Interdependent Portfolio” and “Bringing the Portfolio to Life.” The Pathway identifies several specific [practices and milestones](#) that may be pivotal when making these critical moves.

Recently completed projects, like [ReThink Health Ventures](#), revealed insights about what it might take for members of a multisector partnership to shift their mindsets and actions around resources. Through a simple [table-top exercise](#), they imagined how new investments in vital conditions could eventually alleviate adversity, avert costly urgent services, and assure more equitable opportunities for everyone to reach their full potential. Of course, imagining and doing are different things, therefore, there is still much to learn about *how* professed priorities actually shift resource flows within a local, living economy.

What Will We Do? Knowing there can never be only one authority that enforces all allocation decisions, this project will work with specific selected stewards to explore how their own investment priorities could generate greater results within a wider regional portfolio. Working together in a *Portfolio Design Lab*, we will address practical questions such as:

- What might more effective resource allocations look like?
- What are the main constraints on shifting resource allocations, and how do these vary by institution?
- How do those who “hold purse strings” (i.e., local governments, philanthropy, corporations, etc.) envision their roles?
- What processes and motivations enable investors to connect their institutional interests with a broader regional vision?

Over the next two years, we will work with six selected entities who are poised to make short-term resource allocation decisions that may significantly impact health and well-being in their respective regions. Together, we will develop tools and processes to first situate their investment priorities within a wider regional portfolio; and then revisit their own allocation decisions about how best to produce equitable health and well-being over time.

What Will be the Outcomes? This project will generate insights both about *what* it takes and *how* to shift resource flows in an interdependent regional system. Also, iterative improvements to the *Portfolio Design Lab* will yield a curated suite of tools and processes for regional stewards who want their own investments to have much greater impact on equitable health and well-being.

Well-Being Portfolio

