

Voices of Partners:

FINDINGS FROM THE COMMUNITY/STAKEHOLDER ENGAGEMENT STUDY



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A Report for The California Endowment

By Frank Farrow and Cheryl Rogers

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The Center for the Study of Social Policy (CSSP) is a nonprofit public policy, research and technical assistance organization with offices in Washington, D.C., Los Angeles and New York. CSSP works with local, state and federal policymakers, foundations and community leaders across the country to create new ideas and promote public policies that secure equitable opportunities and better futures for all children and families. CSSP strives to achieve this by focusing on the families facing the most significant barriers – including families living in poverty and those whose lives are affected by discrimination based on race, immigration status, sexual orientation and gender identity. Frank Farrow is the President of CSSP. Cheryl Rogers is a Senior Consultant to CSSP.



Acknowledgements and Appreciation

“Voices of Partners” is the main report produced as part of The California Endowment’s Community/Stakeholder Engagement Study of BHC.

Through this process, we have had the pleasure of talking with 175 Californians engaged in, helping to lead, observing or learning from BHC’s work.

That has been an inspiration. People are deeply committed to the work, generous with their time in talking about BHC and appreciative of the foundation’s invitation to provide candid opinions and recommendations for the future.

It has also been a pleasure to work with the TCE team who guided the Community/Stakeholder Engagement process since its inception and continue to plan how best it can serve the foundation. These leaders had the vision to seek feedback about the component parts of BHC while simultaneously wanting the report to illuminate the big picture questions about what BHC is accomplishing and how it can be even more effective. Chaired by Tara Westman, the team includes Hanh Cao Yu, Leticia Alejandrez, Ray

Colmenar, Alexandra Desautels, Jessica Fuentes, Judi Larsen, and Tida Leagnavar.

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Introduction

The California Endowment (TCE) launched its Community/Stakeholder Engagement (C/SE) process in the fall of 2016 as part of a mid-point review of Building Healthy Communities (BHC). The aim was to learn from a wide range of people involved in or knowledgeable about BHC – including adult and youth residents in BHC sites, other community partners, state advocates and policymakers, evaluators and funders – their perspectives about BHC after its first five years of operation.

TCE is committed to using stakeholders' feedback for several purposes. Their views will help foundation leaders shape BHC implementation between now and 2020. In addition, TCE will use stakeholders' perspectives as one important source of information as the Executive Team and Board consider strategy and investment options after 2020.

By design, the C/SE process was one of unusual scope and depth, and had ownership from across the foundation. It was guided by an Integrated Team representing the major program units of TCE. The team was chaired by Tara Westman and included Hanh Cao Yu, Leticia Alejandrez, Ray Colmenar, Alexandra Desautels, Jessica Fuentes, Judi Larsen, and Tida Leagnar. The team in turn engaged the Center for the Study of Social Policy (CSSP) to conduct an independent study process between November 2016 to February 2017, according to a plan approved by TCE's Executive Team and Board in September 2016.

CSSP, with concurrence from the team, organized the study around five strategic lines of questioning:

- 1. Impact in the first five years:** What do stakeholders perceive as BHC's most significant accomplishments? What could have been done better?
- 2. Opportunities looking forward:** What changes can make BHC even more effective between now and 2020?
- 3. Alignment of state-local advocacy, policy/ systems and narrative change:** How have community and state or regional forces worked together to advance health equity? How can this be more effective?
- 4. Sustaining a movement for health equity:** What alliances, capacities, leadership or other forces

should be sustained beyond the period of BHC funding, and how?

- 5. Innovation and new directions:** What areas of opportunity and possible innovation should TCE consider beyond 2020 in the continued advancement of health equity?

Data collection was conducted with 175 people, from across BHC sites and in statewide roles. Sixty-two people participated in individual interviews, lasting for about 1 ½ hours each. An additional 113 people participated in 11 focus groups, and the interplay of ideas possible in this format complemented the individual perspectives gained from the interviews. The participants included people playing many roles in relation to BHC: adult and youth residents of BHC neighborhoods, community partners, state advocates and policy makers, evaluators, thought partners and funders. (A detailed breakdown of the participants is included in the appendix on study methodology.) All participants were nominated by TCE program staff – from Healthy Communities (HCOM), Healthy California (HCAL), Enterprise and the Learning and Evaluation team (L&E) – with the distribution of nominees and participants, by program unit, shown in **Figure I**.

"Voices of Partners" is the main report from the study. It provides feedback on respondents' views about the central questions around which data were collected:

- **BHC Accomplishments:** What do stakeholders view as the major successes of BHC and partners to date?
- **Less Successful Aspects of BHC and Recommendations for the Future:** What do stakeholders view as least successful about the initiative? Were there missed opportunities? What would they recommend be different in the next four years of BHC?

In addition, CSSP has shared shorter specialized reports about other issues with foundation staff and leadership.

Before turning to the findings, a few overall observations may be helpful to the reader.

First, we appreciate the generosity of time and interest shown by everyone asked to participate in interviews or focus groups. People gave their time freely and shared their views openly and honestly. Almost all

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FIGURE I: Community/Stakeholder Engagement Participants, By Program Unit Nominating Them

HCAL & Enterprise nominees	State Advocates and Policymakers	51	29%
HCOM nominees	Adult Resident Leaders, Youth Leaders and Other Community Partners ¹	93	53%
Learning & Evaluation nominees	Thought Partners ² and Local Evaluators	22	13%
Funders nominated by multiple units	Funders (state, national and site-based)	9	5%
TOTAL Participants		175	100%

respondents expressed appreciation to TCE for its interest in their feedback and advice. In that spirit, they praised BHC's efforts to date and offered critiques and recommendations that they trust will be used by the Endowment.

Second, this report has a distinctive "Yin and Yang" quality to it, reflecting the nature of the feedback we received. The people we spoke to had, for the most part, strong feelings about BHC, recognizing it as a major force for change in California, and they shared both praise and criticism. Thus, people noted many major BHC accomplishments – and also pointed out things that they thought could have been done better. For example, people credited TCE with extraordinary leadership in guiding Californians to a new discussion of health equity and new awareness of the social determinants of health – and felt equally free to comment on how TCE's own culture could more fully represent BHC's values. In short, on most lines of questioning in this study, people have both compliments and constructive criticism or, more rarely, complaints. In some instances, this results in directly contradictory feedback to TCE, and we have noted these instances in the text.

Given this quality to the feedback, we have organized the report to present this "Yin and Yang" as faithfully as we can. In particular, Sections I-V, which address major aspects of BHC, are organized to first present major accomplishments in a given area, then describe what respondents viewed as less successful elements in that same area, and then finally summarize people's recommendations for the future. The remaining two sections, Section VI, "The Challenge of Focus, Coherence and Reach," and Section VII, "TCE Leadership, Culture and Operations," are organized somewhat differently. These sections summarize feedback that people gave spontaneously on these topics and thus do not fall as neatly into the format of "Accomplishments" and "Less Successful Elements." However, in both there are recommendations for changes in future years.

Third, we have included an unusual number of direct quotes in the report. In fact, the report is built around direct quotations in the voices of respondents. This makes the report long, but we felt that the quotes capture the concreteness, nuance and feeling of people's feedback in a way that summaries could not do. We have tried to help the reader stay oriented

¹"Community Partners" include leaders of non-profit organizations, civic leaders and local public sector officials.

²"Thought Partners" are distinguished experts and observers of social change in California.



through the length of the report in several ways. At the beginning of each major section, a short “guide box” indicates the main topics, as well as information about how many people spoke to us about these topics. In addition, an Executive Summary accompanies the report and provides a synthesis of findings for readers who do not have time to read the document in full.

Fourth, and in a more technical vein, in analyzing respondents’ feedback, we have looked for patterns of different responses from different groups of stakeholders. The use of individual-level descriptors in analyzing the data (that is, knowing the category of stakeholder for each respondent) allowed us to look closely at the subgroups of interviewees whose comments are linked to each of the key themes outlined in this report. Although the distribution of interviewee characteristics within themes generally mirrors patterns in the overall sample, we did observe a few areas where certain types of individuals showed up in notably larger percentages than they did in the full set of 62 interviews. For example, respondents who called for “more networking opportunities” as a way to improve BHC’s impact on policy change all had some connection to local work (100% vs. 71%, which is the percentage with “some connection to

local work” in the overall sample). Also, a larger share of community stakeholders said that “support for resident organizing and leadership” was less successful than it could have been (91% vs. 42%), described issues related to “forced collaboration” (68% vs. 42%), and named “greater attention to racial equity” (75% vs. 42%) as well as “engaging other funders” (67% vs. 42%) as missed opportunities. A larger share of individuals who work only at the state level were represented in the subgroup that talked about the need to “strengthen organizing” (45% vs. 24%). And a larger share of state stakeholders mentioned a lack of clarity about state/local alignment aims and methods (64% vs. 35%).

Finally, several themes recur throughout these pages, and we highlight a number of them here so that the reader will be prepared for the “themes and variations” that appear. Respondents:

- **Credit BHC with many successes and accomplishments.** They recognize and admire TCE’s boldness in undertaking this initiative and the foundation’s commitment to health equity.
- Appreciate that, through BHC, **the foundation has redefined the conversation around health and health equity in California.**

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- **Admire BHC's and TCE's commitment to mobilizing community residents and to community empowerment** as essential ingredients of achieving change in policy and systems that, when altered, can contribute to better health outcomes and health equity.
- **Praise, in particular, TCE's investments in community organizing**, citing it as one of BHC's top accomplishments. At the same time, many of these same people commented on ways in which organizing was (in their view) missing the mark and recommended that, for the future, BHC's organizing efforts provide more consistent support for resident and youth voice and leadership.
- **Urge TCE to listen even more carefully to community priorities**, reflecting a feeling by some respondents that TCE continues to set too many of the priorities in BHC.
- **Recommend that BHC engender an even stronger "culture of learning"** so that the effects of TCE's investments can have an increased cumulative impact across the 14 sites and statewide. People recognize how challenging and difficult the work of BHC is and are eager for the knowledge, support and information that comes from more intense learning with peers.
- **Recommend that issues of racial equity and cross-racial and ethnic dynamics be addressed even more directly** in BHC as it moves forward.
- **Suggest that TCE's own operations can go still further in reflecting the values of BHC**, including greater integration among the parts of BHC; greater coordination within TCE as an organization; a careful assessment by TCE of its power dynamics in relation to sites; an urging that TCE be more humble at times as a partner; and that the foundation have greater transparency and accountability in the funding decisions undergirding the initiative.



We turn now to the findings in this first report, which are organized as follows:

- Section I: People Power: The Power of Organized Communities
- Section II: Policy and Systems Change
- Section III: Partnerships and Collaboration
- Section IV: Narrative Change
- Section V: Leveraging Resources
- Section VI: The Challenges of Focus, Coherence and Reach
- Section VII: TCE Leadership, Internal Culture and Operations

I. People Power: The Power Of Organized Communities

The statement by TCE that community matters, that community engagement matters, that youth engagement matters, is of enormous importance. It is also a model to philanthropy, and the infusion of funds that goes with that is enormously important. And, the fact that it's a ten-year investment, symbolically I'd say it's very, very important. (STATE ADVOCATE)

Interviewees consistently recognized “People Power” and community organizing as among BHC’s greatest accomplishments. In response to the question, “What do you see as the greatest successes of BHC?” the mobilization of community residents to advance health equity was mentioned by 74% of all interviewees. This response came from all types of stakeholders, at both the state and local levels of work; they noted that BHC’s focus on “People Power” was especially important now, given what they perceived as a new federal policy climate of exclusion and disinvestment.

“People Power” refers to BHC’s Drivers of Change that focus on ensuring that neighborhood residents – young people as well as adults – have voice and influence sufficient to help change the rules that allow inequities to be perpetuated in low-income communities, and to create opportunities in areas that affect health outcomes. This requires organizing and leadership development, with the aim of having more residents and young people participate in decision-making forums. “People Power” also envisions adult and youth residents who have the tools to help change the systems that prolong under-investment in marginalized communities.

In this section, we look first at what people cite as the successes of BHC’s organizing activities. We then focus on areas where respondents felt that BHC’s organizing

efforts have fallen short, including inadequate supports for adult and youth leaders and insufficient attention to race equity and racial dynamics in BHC neighborhoods. At the conclusion of this section, we summarize respondents’ recommendations made for improving BHC’s organizing efforts in the future.

A. ACCOMPLISHMENTS

Respondents applauded BHC’s investment in community organizing as an effective way to interrupt power structures that overlook marginalized residents. TCE’s investments in individual and organizational capacity-building were seen as contributing to an emerging infrastructure for organizing. Adult and youth respondents specifically described the sense of empowerment that they felt as they took their place at decision-making tables, engaged in policy advocacy and became more civically engaged.

- 1. Organizing as a Primary Vehicle for Social Change.** BHC’s commitment to community organizing was seen as rooted in a social change strategy that emphasized early and ongoing resident engagement and acknowledged residents’ right to inform and influence decisions that affect them:

A. People Power: Accomplishments (cited by 46 people)

1. Organizing as a Primary Vehicle for Social Change
2. The Multiple Benefits of Organizing
 - Resident empowerment
 - A seat at the table
 - Policy advocacy
 - Civic engagement
3. Expanding Youth Voice
4. Creating an Infrastructure for Organizing

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“The first accomplishment (of BHC) is that a major foundation has put a lot of effort into really trying to build everyday people to take action to improve their health, a large-scale investment in actually making those people who are the most impacted, those communities most impacted, to actually try to take action.” **(State Advocate)**

“One of the strongest contributions, given the criticism and indeed some of the failures of the work that’s place-based, is the honest and grassroots engagement of community members not only in determining what the priorities are, but also planning what the interventions are. When the story is written, the success of this effort will tie very much to community engagement.” **(Funder)**

“We were fighting for accessible housing and local jobs while the City was developing its “Community Plan for Downtown Long Beach.” Unfortunately, we did not win what we wanted, but it was still a good experience because we were able to get more than 400 people involved, getting them to City Hall. That’s not an easy thing, but we were able to do it. They even had to use the library and put screens up there so that the people could see what was going on.” **(Resident Leader)**

“A lot of young people wanted to have a voice in Merced because a lot of kids felt like they weren’t heard by adults. Some kids advocated for a youth council. And then we actually did get that, so now our connection with adults on our city council has changed because they come to us and we have conversations. We talk about Merced, and then we’ll talk to our friends and relay messages to everybody and then sometimes go to town hall meetings.” **(Youth Leader)**

2. The Multiple Benefits of Organizing. Residents felt a growing sense of agency and empowerment as they joined decision-making bodies, engaged in policy advocacy, and became more civically engaged. They saw themselves as having the knowledge, skills, and motivation to take action and make a difference in multiple ways:

- **Resident empowerment.** In focus groups, adult and youth residents talked about how having a

voice in their neighborhoods had helped them grow. They praised BHC for bringing them together and making them aware of their own power. They talked about the dire need for change in their neighborhoods as the single biggest motivating factor that propelled them into becoming leaders:

“My building was falling apart – when you’d leave your apartment to take the trash out, the water would fall on our heads. And I live in the first floor, so I suffered. But I went after the owner with the help of three people. That was my support, those three people. The owner got angry because the city told him, “You have to change those pipes.” Well, he spent thousands of dollars changing all the pipes. The owner couldn’t even stand to look at me. He would tell me that I was a snake and I would feel this sensation in my head, like I was about to have an embolism. But I continued on with it. Now my neighbors call me when something goes wrong. I feel like a leader, you know, not a very strong one, but I do feel like a leader to them.” **(Resident Leader)**

“I saw all the injustices in education, in housing when I was homeless with my kids, and with health when I got cancer and had my health insurance revoked because that’s what the law used to be like. It didn’t matter if you were a citizen or not, if you spoke English or not. The thing is that our people are being buried, buried, and buried. That made me have this courage to be able to start these different workgroups: we have the health ambassadors’ workgroup, the school advocate group, the security one, and they’re all linked to Building Healthy Communities.” **(Resident Leader)**

“Part of me feels like a leader, part of me does not. One of the things that I’ve learned is that it’s important for people to see us as models. I was having a hard time in my life, but the people at this one organization recognized what I didn’t see in myself, which was that power to grow and to be different. In fact, the director of that organization told me, “You’re a diamond in the rough that needs polishing, but you are going to become a leader.” **(Resident Leader)**

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“Sacramento ACT did a training for a lot of the BHC grantees that trained us to provide testimonies at the County Board of Supervisors. During this training I was like, No, I’m not going to testify, but I was having this issue with this one particular patient, this gentleman who has multiple chronic illnesses and he couldn’t go in to see a provider. So I decided that if I don’t say anything, if I don’t share this story, they’re not going to know. So I summoned up the courage to go through it and they called my name and I went and I testified for this gentleman. I think it’s the human aspect of it. It pulls at your emotions.” **(Resident Leaders)**

“In the beginning, when we used to go to these councils and boards, they used to see us as, “Oh, here they come again.” But now they see us as allies, now they want to hear what we have to say. Last week, a couple of the youth residents went to talk to the board about the general plan, so they had the opportunity to say, “The General plan has to accommodate the youth, the residents.” **(Youth Leader)**

“Giving people the resources and the space to say who they are and be who they are is essential to changing systems. They didn’t feel like their voice was important. And having those resources and targeting those communities provided them with that ability to feel like they were important and that they have a voice.” **(State Advocate)**

- **A seat at the table.** Community partners and state advocates talked glowingly about how BHC had helped get residents a seat at various decision-making tables. Presumably, many of these residents hadn’t had this opportunity before:

“We have seen a growth in local resident leadership. They are involved in these communities, as well as a part of the decision-making. Resident leadership definitely happened as a result of this work...none of this would have occurred if it would not have been for TCE’s work in this area.” **(Community Partner)**

“I think there were a total of nine participants that completed [boards and commissions

leadership training]. One of the participants actually did get appointed to be on the Parks board. For her, the experience did exactly what we were hoping – participants would go through and see the path for how they could become a board member or commissioner, and begin to influence decision-making in a way that was reflective and responsive to their experiences and needs in their neighborhood.” **(State Advocate)**

“The city of Merced is working to develop an active transportation plan city-wide, and we worked with a community resident to get her on the committee that will identify priority projects for implementation through that process. Being able to provide support to community residents, to have a direct seat at the table, a direct vote at the table, is pretty powerful.” **(State Advocate)**

- **Policy advocacy.** Many people talked about the growing ability of residents to engage in policy advocacy. This was the centerpiece of much of the youth leadership development work in BHC, as well as for adult residents in many sites. We heard many examples of policy victories brought about largely because residents were involved in planning, testifying and organizing other residents to demand change. Most of the examples took place at the local level, but some were centered in Sacramento where policy change affected the entire state:

“We’re working on getting parents to be familiar with school district budgets, have their voices heard, and question the school district’s budget process. For example, the Kern High School District said they had budgeted \$100,000 for parent centers. When we examined the budget, they had zero parent centers listed. As a result of parents becoming involved, we now have ten parent centers in the high schools.” **(Community Partner)**

“I’ve seen them [residents] come up here to Sacramento and advocate on policies that are important for various issues like Health 4 All, young men and boys of color issues, criminal justice. Any time we empower communities, either through BHC sites or through other

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organizing tools, to come up to Sacramento and be part of the democratic process, it is important. And I see that first hand with BHC.” (State Advocate)

- **Civic engagement.** A number of people talked about the growth in residents’ civic engagement as one of BHC’s greatest accomplishments. Residents became more aware of their duty as citizens to vote and serve on juries and other commissions. Residents also began taking part in Get Out The Vote (GOTV) campaigns aimed at increasing the number of people who vote, adding new people to the voter registration rolls and educating voters about some of the specific issues in upcoming elections. This work is non-partisan and important, not only because it increases participation in the democratic process, but also because it helps develop local leaders who can help shape public policy decisions that affect their lives:

“During the Get Out the Vote campaign, we did a campaign where we wanted to get out pledge cards and the main organizer really wanted us to go door to door knocking and get these folks to pledge to vote. Instead of sending my staff door to door when we were canvassing (BHC Site Sacramento), I told them to go to the temples that they already had relationships with. So we did that instead and were really successful when it came to getting them to commit to signing the pledge cards. If you tell someone you already trust that you’re going to do something, you’re more than likely to follow through on it versus a stranger you just met.” (Resident Leader)

“True North has successfully held multiple candidate forums for school board districts where students and community members developed the questions related to big, important racial and social equity issues. Those candidate forums were monumentally successful at getting the community out, providing a nonpartisan space that had never been seen in the community and region before. Incredible, it set the tone for the whole community about how to better understand options for choosing your



decision-makers and the policies they make.” (Funder)

- 3. Expanding Youth Voice and Organizing Capacity.** Youth leaders described different ways in which BHC supported them to become leaders on behalf of their communities:

- **Finding their voice.** Virtually all the young people we spoke to described how their work with BHC helped them find their voice so they could advocate for their communities. They noted how they came into BHC and worked to organize their peers and neighbors to make their communities more just and healthier places. Some were already members of a youth organizing non-profit, while others were drawn into BHC when someone they knew or admired invited them. Young people identified specific examples where they helped win victories, ranging from advocacy on school-related issues to voter engagement to land-use planning. They described their work as beneficial on multiple levels: it led to their own personal growth as well as concrete improvements in their neighborhoods:

“Youth were at the center of all that work. For example, when it came to the advocacy

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work, we were the people that were marching. We were the people that led social media campaigns and developed and created them, we were the people that did the outreach, educated, and talked to the community people about these things. I feel like young people were the boots on the ground that made that happen; especially the school district campaign was 100-percent young people.” (Youth Leader)

“TCE has become a national leader in understanding the value of developing, fostering and lifting up youth leadership as an incredibly powerful force for change. Their enormous appreciation of and investment in youth leadership is a huge accomplishment that is a credit to TCE.” (Funder)

- **Developing leadership skills.** Young people also described how BHC helped them grow their skills so they could take on increasing responsibilities for improving their communities. Giving them opportunities to attend organizing conferences and leadership training sessions, pairing them with mentors, and giving them organizing experience all contributed to their personal leadership development:

“I think it [BHC] has successfully exposed youth, who often come from underserved areas, to things that they normally wouldn't be exposed to – so, conferences, going to the Democratic Convention like I did, stuff like that. That really opens youths' minds about what they can do and how big the world is, and how they're learning. That's going to be very helpful for them in the future.” (Youth Leader)

A group of young Native American women told us how much they grew personally in their leadership capacities through their work with the True North Organizing Network, the non-profit funded through BHC in Del Norte. Through this work, these youth found their voice and became more comfortable connecting with and talking to other people. They learned about the benefits of networking, and they built stronger relationships with other youth and adults alike, giving them a more powerful sense of purpose than they had had before BHC:

“I learned how to talk to people and it created this kind of strength inside of me that made it okay to show my personality more and to talk to new people and not necessarily be afraid anymore of those kinds of experiences.” (Youth Leader)

Several of these Native American young women went to Standing Rock while the protests were happening in the early fall of 2016. They talked about the experience as thrilling, inspiring and life-changing. They said it opened their eyes to a broader world that they had never known or even imagined. They loved meeting people from all over the country and the world, and they felt empowered and awed by the sense of unity around the need to protect the earth. They came back from that experience thoroughly invested in sharing their experiences with peers so others could learn from their experience as well:

“I was at Standing Rock. I started out fire keeping and then meeting so many different people opened my eyes to how I can bring that help with organizing and become an organizer myself. I want to take what I learned from there and bring it to the different fights here and teach other people that same experience because we are the seventh generation. We're the ones who are going to have to take this into our hands and we are going to have to fight.” (Youth Leader)

“Yeah, it was incredible for Native youth to come together [at Standing Rock] because we were exposed to things that we weren't aware of. It was incredible learning about Native peoples and how they're all coming together for this one movement and just how beautiful it is; it really makes you feel good about yourself and who you are and where you come from and it inspires you. When we came back home, we had a stronger voice and we shared it with all our people and that was important because a lot of native people are exposed to drugs and alcohol, things that make them forget what they're here for and what they need to do to keep their people alive. It was like a spark for us to go to Standing Rock, then to come back and bring that back with us.” (Youth Leader)

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- **Connecting in youth events and gatherings.**

Finally, young people spoke passionately about the importance of connecting with their peers, often through participation in or helping to host youth-specific events. Events such as workshops, conferences and concerts were a big part of the way young people engaged with each other and with BHC, so it was a major topic of conversations in the focus groups. They valued these events as critical, and talked about one of the greatest benefits being the opportunities they afforded to connect with their peers. In one community, for example, peer outreach was an especially effective strategy for recruiting youth leaders. Respondents also described how youth leaders from different communities learned from each other and, over time, formed increasingly close-knit relationships:

“The way I saw it at Sisterhood Rising is, you meet someone, you’re nervous and you don’t really know them well, but during those weeks of being on the high ropes and the deep circles, you get to understand where they’re coming from and you start to hear about their issues in their city and you figure out, oh, we have the exact same issue, or something similar to it. So when you start talking about the bad, you start to think, well, what can we do to fix it? Then our ideas start to emerge from just this one little circle to our own little groups and then those groups get bigger and bigger and the next thing you know, we’re spreading out like spider webs.” (Youth Leader)

“We had a good relationship with youth from the other sites and we were able to visit [Oakland] and [Richmond] sites, and see the different youth centers. That was very helpful for us because we saw issues that they were working on that we didn’t even think about. We were like, “Wow. We didn’t even know that we could have a youth center here.” Things like that that we were not even exposed to.” (Youth Leader)

“[At Standing Rock], I remember one night I showed pictures of our rivers from here and the beaches and everyone was so amazed. They were like, “That’s beautiful over there.” Now they want to come to California. So

it’s not only sharing just culture, but we saw the different kinds of land ‘cause we have mountains and they have hills. They have sky. We have trees. They have a different kind of beauty. But what bonded us was we were all there for the same fight.” (Youth Leader)

- 4. **Creating an Infrastructure for Organizing.** The expansion of People Power involved capacity-building for residents and support for new, usually grassroots organizations. These initial investments are helping to establish an emerging infrastructure for organizing. People described various capacity-building activities for residents, including coaching on public speaking, advocacy training and preparing Community Partners to sit on decision-making bodies such as local boards or commissions.

Youth leaders especially appreciated TCE’s deliberate investment in them. Community and state leaders emphasized that youth organizing required considerable intentionality: BHC strengthened the local infrastructure for youth leadership development by providing resources and capacity-building support to organizations that work directly with young people. At the state level, BHC also functioned as a central organizing structure to amplify the voices of young people. Cumulatively, young people and adult residents applauded TCE for investing in the organizing infrastructure that helped produce so many policy and systems change victories in BHC neighborhoods and across the state:

“BHC invested in youth, and that was good. They were like, “We’re going to provide the resources to do the kickass work that you’re already doing, or to take that work and put it to the next level.” That is one of the things that has worked best.” (Youth Leader)

“BHC has been incredibly effective at building community capacity. Because BHC came in with a community organizing frame recognizing the power of building Community Partnership, they have done an enormous amount in a very patient and intentional way to invest and build and understand those dynamics of Community Partnership.” (Funder)

“BHC and grantees have been great at ramping up the engagement of community

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residents, who were already engaged at some level, and getting them more experience in direct advocacy. They provide them training and help them develop the necessary skill sets. The capacity and the empowerment of the folks that were involved initially has substantially increased.” **(Community Partner)**

“Not everybody feels they have agency to be able to change things that don’t work. And the investments that foundations like TCE has made and the ones that we did all those years ago gives people skills, direction, agency to make that change themselves. It’s what you get to leave [behind] once the funding ends and the foundation is focused on other things. You get to leave leaders. So that’s an enormous contribution.” **(Funder)**

In addition to building the capacity of individual adult and youth residents, BHC seeded new organizations. People cited ways in which BHC supported community groups and grassroots organizations so they could grow, sometimes even becoming non-profit organizations. TCE provided seed funding, capacity building resources, training workshops, and communications support, which allowed these organizations to play more active and effective roles in their communities. In some cases, they were able to expand their efforts to include a stronger and more explicit focus on organizing. Many of these new organizations worked in the restorative justice space:

“I’m seeing community groups become their own 501(c) (3) s, get their nonprofit status and get funding so that they can undertake their own projects. I think that is powerful and a great example of small community groups gaining power and capacity.” **(Community Partner)**

“BHC supports and helps establish some new organizations that are taking a lot of leadership like in the areas of restorative justice and working with undocumented people, whether it’s trying to get comprehensive immigration reform or trying to fight back against deportations. There’s a cadre of organizations that are relatively new. They started as a result of TCE being willing to stick out its neck and risk seed money.” **(Community Partner)**

“I think that the attempt at investing in local organizations makes a lot of sense. Even for the ones where TCE funding is no longer part of the work, I have a sense that if you were to talk with them, there would be some movement of the organization toward advocacy in a way that didn’t exist without TCE funding. I share that because we work with groups who had received TCE funding, and no longer receive it – but the priority to build up advocacy capacity remains. That was encouraged by the foundation’s philanthropy, and the resources that they provided to these smaller organizations.” **(State Advocate)**

“Because they invested and took risks, we were able to create a whole new organization built by formerly incarcerated people who led the work and built the organizing power --but it wasn’t micromanaged at all. We were first to cut the homicide rate in half in one of the most violent cities in the country, the first county to defeat a proposed jail expansion, [so that you could] put all that money –literally tens of millions of dollars – in housing, jobs, you can go down the list.” **(State Advocates)**

B. LESS SUCCESSFUL ELEMENTS

Alongside the general acclaim for BHC’s organizing efforts, a significant number of respondents criticized current practice, saying that BHC needed to deepen its work in this area. Three types of criticism stood out. The first came primarily from residents and youth who are involved in current organizing efforts, but also from some community partners and a few state advocates: a conviction that residents and youth were not receiving enough support in their organizing activities. The second was voiced more frequently by community partners and state advocates, who felt that BHC was not using the full range of organizing techniques and methodologies. The third was of a different nature: an urging for more explicit attention to racial and ethnic dynamics within communities in order to build power across racial and ethnic lines.

1. Lack of Support for Adult and Youth Organizing and Leadership Development.

Roughly half of the adult and youth residents that we spoke with in focus groups (34 residents) and eleven state advocates and community partners said they

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felt that residents were under-used and under-supported, given BHC's central aims of power building. They thought there had been insufficient attention to resident leadership development, especially to bringing residents to speak out in statewide platforms or with their local elected officials. Not surprisingly, people working at the community level were particularly likely to express this view (91% of those with this opinion worked at the community level, rather than an expected 42% based on the overall mix of respondents).

Many of the residents cited **the need for more support and wanted more decision-making authority over strategies and resource allocation.**

Communication emerged as a major issue here: 20 of the residents specifically urged better communication between BHC and residents. Several noted that cross-site communication was practically non-existent, although they felt it would be extremely helpful for them to know what residents were doing in other sites:

“ We [residents] wanted more influence on how money was being spent and what the strategies were. We'd hoped the Resident Advising Board would be a lot better than just another planning taskforce or another planning event to bring out other residents. I thought it was a way to have that conversation where we can come to mutual agreement, but it didn't become that: it just became, “Okay, resident... What do you want? You want a block party? Let's plan that block party.” Well, that's kind of pointless to me.” (Resident Leader)

“ BHC only shows up when they are making an announcement about events or when they want a resident to participate. But it's not like, “Yo, what's going on in your neighborhood? We're here to listen to you and see what we could do to support you.” (Resident Leader)

“ TCE hasn't put enough value on resident leaders that have grown into professional people. It's been frustrating for those of us that have gone that way. I can see the younger professionals that have grown out of the community, were part of the initiative as youth leaders, now that they're in professional

B. People Power: Less Successful Elements

1. Lack of Support for Adult and Youth Organizing and Leadership Development (cited by 45 people)
2. Expanding BHC's Organizing Framework and Methods (cited by 11 people)
3. Insufficient Attention to Racial Equity and Cross-Racial and Ethnic Dynamics (cited by 16 people)

positions, I could see them getting mad at the way they're being treated now.” (Resident Leader)

“ We don't have the kind of broad resident engagement that you'd expect. In our community, you have to be affiliated with a school or other organization to be part of it. It's organizationally-driven resident engagement.” (Resident Leader)

“ If the goal is still to shift power in these communities back to the residents, then how we do this work should look different: meetings should not be taking place during the regular business hours. If we're really keen on engaging residents, asking them and preparing them to lead the work, then we, the grantees, need to change.” (Community Partner)

“ One of the things The Endowment missed was supporting those of us who have been leaders in our community for years. Their whole belief is that they need to create new leaders. They act like the only way that life can change is if new leaders emerge from teenagers. But they offend existing leaders who are already in place. They even went so far as saying that no elected officials and nobody that had any sort of existing

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acknowledgement by their communities could participate in the leadership development process.” (Resident Leader)

Young people also thought their work was under-supported. They expressed gratitude for TCE’s commitment to their work, but said they needed greater support – more resources, more staff support and more avenues for collaboration – if the infrastructure for their activism and leadership was to be powerfully effective and sustained:

“It’s really easy to be idealistic, and be like, “We can do it all with what we have,” but sometimes, we can’t be so idealistic. Part time people can’t do full-time jobs. Let’s be practical. There’s a lot of money to be thrown around, so why not invest it in a couple of good beat reporters, some design equipment, some updated photography equipment, stuff like that, so that the content that we produce is youth-driven, but it’s also really high quality, because we don’t want youth content that’s the bare minimum, something that a blogger could do. We want to elevate that, but it requires funding and practicality, not just expecting it to happen. (It requires) giving us those concrete tools to do that work.” (Youth Leader)

A number of young people mentioned **their need for dedicated space to do their work**, noting that much of their work was not affiliated with organizations that provided physical space:

“We put our print edition together in a Starbucks. We stayed all day, designing, editing, everything, photo, translation, it goes on. You know my office is the Starbucks.” (Youth Leader)

And finally, young people wished there was some type of a pipeline for youth “aging out” of BHC:

“What happens to our young people when they age out? [presumably at around 24 - 26.] There’s no room for them to go anywhere within the program. We set them up, and we’re here to support them, but once they start to age out of the program, there’s nowhere in BHC for them to go. There’s no one opening their doors to them. It would be interesting to consider like an

alumni program or something, like some sort of post-network thing.” (Youth Leader)

2. Expanding BHC’s Organizing Framework and Methods. Eleven people talked about their disappointments with BHC’s organizing efforts. Some wanted to see new strategies applied or new groups brought into the organizing fold. These people had specific concerns with the way BHC rolled out its organizing framework during the first half of the initiative and made suggestions for changes going forward. One person mentioned the need to push beyond the limits of traditional organizing and use alternative, more innovative methods; another wanted greater focus on parent organizing, feeling that intergenerational organizing had not been fully realized; and yet another urged taking greater advantage of community colleges as an infrastructure to institutionalize organizing training and leadership development. Again, this viewpoint came disproportionately from community partners (45% of the people holding this viewpoint were from the community, as opposed to an expected 24%):

“There needs to be more investment in alternative forms of organizing methods. Not everything has to be about an organization, a CBO format. Let’s develop alternative spaces that build a critical analysis around health and health outcomes and let people organize around art issues, or block issues: building the capacity of people to be able to group themselves together and focus on these issues.” (Community Partner)

“The biggest missed opportunities are around parent organizing. They’ve done an amazing job around beginning to support youth organizing. But the part that’s missing is on the intergenerational piece and I think there’s been far less effort to organize and mobilize parents as parents.” (Thought Leader)

“The Endowment failed to see the value of building organizing capacity in the community college system. If we could take nine community colleges and build out a leadership development program that’s about community organizers, community

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development, community transformation, and tie it to a curriculum that's already there, you could build a lot of on the ground capacity. TCE should have looked at how we could build these pathways into social justice careers at the high school and community college levels.” **(Community Partner)**

“I wish TCE had not led with money. They could have better spent the upfront time looking at what's happening organically in sites. Looking for natural places where people are coming together and wanting to work across race lines and issue areas. The money messes things up. Everybody organizes around the money as opposed to organizing around the community problems.” **(Funder)**

3. Greater Attention to Racial Equity and Cross-Racial and Ethnic Dynamics. In talking about BHC's good record in building People Power and strengthening community organizing, a number of people expressed disappointment that BHC did not more directly address racial equity issues and help communities move forward on complex cross-racial and cross-ethnic dynamics as communities

built People Power. The criticism was expressed primarily as insufficient attention to racial equity and racial/ethnic dynamics at the community level which, these respondents believed, compromised or limited the power of organized communities to change the rules that perpetuate health inequities. Without full inclusion of all races and ethnicities, people felt BHC's successes were less than what they could be in the future.

Sixteen people felt that racial equity had not been sufficiently on the front burner from the beginning of BHC. They believed that more attention has been paid over time, but still saw this as a matter of occasional trainings, not helping communities address these issues in a sustained and consistent way. People also noted that BHC has not deliberately worked across racial groups within the BHC sites, but tended to focus on one racial group or ethnicity in a community; these respondents, few in number, believe that cross-racial/ethnic alliances are critical if a stronger movement for health equity is to be built. These 16 people represented community partners disproportionately (75% compared to an expected 42%). This suggests that the urgency around racial

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equity strategies is held most strongly at the local level:

“The framework around structural racism was shared throughout, but you need to really level up around racial equity, asking how we can transform health outcomes across races throughout the state. That is a missed opportunity. There was a round of workshops that were done, one-shot deals, but with that topic you can’t have one training and then expect everybody to run with it. Racism is something that needs to keep coming up.”
(Community Partner)

“They’ve done racial bias training; they had John Powell come and give trainings on what is implicit bias and all of that. But they’ve only scratched the surface.”
(Community Partner)

“It’s mostly Latino in our community. We didn’t do a good job including the smaller African-American community and an Indian Punjabi community. The diversity that originally they had hoped for didn’t actually happen.”
(Community Partner)

“The racial element has been very problematic. You have black and brown folks in the room but that doesn’t mean that people have a multi-racial analysis. There tends to be a very strong African American undercurrent in the LA region, with a lot of fear about the growth of the Latinos. We’re starting to talk about these issues now, but not addressing these things earlier was problematic. We talked about what does it mean that we only have three Latino south of Washington running social justice organizations and yet 600,000 of the 750,000 residents are Latinos. What are we doing to preserve African Americans to stay in south LA? We never had these kinds of conversations until recently.”
(Community Partner)

“When BHC was first introduced, I think there were many Asian-American-Hawaiian-Pacific Islander (AAHPI) community groups that felt left out because it was place-based and often our communities are more geographically dispersed, so there was a lot of concern around that.”
(State Advocate)

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C. RECOMMENDATIONS FOR CHANGE

Recommendations for BHC's Organizing and Mobilization Efforts in the Next Four Years

Stakeholders urge several steps to make BHC's organizing efforts stronger and more sustainable:

- Provide more intensive and consistent supports for resident and youth leaders who are engaged in organizing, including additional training, better follow-up after particularly important events, and regular and proactive communication.
- Expand the number of adult and youth residents who are engaged and consider using a wider array of organizing methods (for example, engaging people who might not be tied to organizations but who could be reached and engaged through other vehicles and alternative forms of mobilization, such as social media).
- Forge stronger ties between grassroots groups and communications and media consultants who are active on campaigns.
- Enable more residents to be engaged in genuine decision-making within BHC:
 - “ We need better communication between BHC and residents. Sometimes they call us together, and then they disappear and we don't hear from them for months. We don't get specific, useable information from them about opportunities in our neighborhood or what others are doing so we know what the gaps are that we want to work on.”
(Resident Leader)
 - “ Developing an organized constituency of community residents needs to be much better; that has not been as successful as it could have been. The lion's share of leadership has been by decision-makers of nonprofits. We have to significantly catapult our development of leadership skills among community residents.”
(Community Partner)
- Put issues of racial equity and cross-racial and ethnic dynamics more squarely on the BHC agenda, including:
 - » More sustained and in-depth training on issues of race and racial equity and justice.
 - » Assistance for community groups to hire staff of color from their communities.
 - » Assistance to communities in building communication, power and united effort across racial and ethnic groups:
 - “ Help us put these [racial justice] issues on the table, and yes, let's address the politics, let's talk about how race plays out within the South LA BHC.”
(Community Partner)
 - “ The level of racial tension could escalate in this new political environment, and while BHC sites have certainly paid attention to that, the quality and the nature of it could be such that we're going to need another set of strategies to address it. Strategies will emerge from the community but driven by federal changes and I don't think anybody anticipated that when BHC was created.” **(Funder)**

II. Policy and Systems Change

The California Endowment has been at the forefront of so many of these huge changes that have happened in California, and not just in our communities, but statewide. I think they've made a very big difference in health and education policies in the state. (COMMUNITY PARTNER)

Like "People Power," policy and systems changes were frequently and positively cited accomplishments of BHC. In fact, BHC's success in changing policy was often linked to "People Power," seen as the result of the organizing efforts of residents and young people, among other BHC activities.

While recognizing sweeping successes, though, many stakeholders feel that BHC's efforts to change policies and alter systems are "still a work in progress." They believe that these efforts can be even more effective in the future and call for greater intentionality in the way that community and state-level BHC activities are aligned; less prescriptiveness on the part of TCE in deciding which policy aims are pursued; and much greater attention to implementation.

In this section, we look first at respondents' many glowing accounts of policy accomplishments and then turn to what respondents feel has been less successful and their recommendations for improvement.

A. ACCOMPLISHMENTS

By any measure, impact on state and local policy is seen as a signal success of BHC. Eighty-nine percent of people interviewed cited significant policy wins at state or local levels when asked to identify BHC's major accomplishments. They mentioned state policy victories; local policy impact; the new resources brought to communities; and the unusual combined action of adult residents and young people, other community leaders, state advocates, communications

and campaign strategists and others as a major factor contributing to policy and systems change.

1. State Policy Wins. Many people identified specific state policy improvements to which BHC has contributed. In these discussions, people recognized that policy victories result from many forces across the state, but most people thought that BHC's involvement was an important and in some cases pivotal force in creating awareness of the need for change and mobilizing the advocacy that helped achieve it. Youth leaders, other community partners and state advocates alike talked enthusiastically about the role BHC had played in multiple policy wins:

"Last year, we went to Sacramento, and a lot of youth came to talk to some of the legislators to tell them about what are the things that they want them to change. They're not just working on personal story, but they're trying to go through policies and political. They were talking about the issues that were on the ballot, like deportation and education, and then there was one about food justice in local schools. It was about a lot of issues that impacted their lives." (Youth Leader)

"(There was)...a statewide victory of expanding coverage to all children regardless of immigration status. And that was a big thing. That could be one of the two most significant accomplishments of BHC." (State Advocate)

A. Policy and Systems Change: Accomplishments (cited by 55 people)

1. State Policy Wins
2. Local Impact on Policy Changes
3. Factors Contributing to BHC's Policy Influence
4. Creating an Infrastructure for Organizing

II. Policy and Systems Changes

“For the BMOC work, we often talk about some of the legislation as the way to help people understand what kind of outcomes we have had. We have been active for six years, and over the course of that time...about 80 state bills around health (have advanced). We have 8,000 people in our database, about 200 organizations actively working throughout the state.” (State Advocate)

“Across the BHC sites, they were working on, like, 220 distinct advocacy goals, and on 40 percent of those their policy had passed.” (Evaluator)

The most frequently cited state policy changes to which BHC made significant contributions are shown in **Figure II**.

FIGURE II: Policy Wins to Which BHC Made Significant Contributions, As Identified in C/SE Interviews

- **SB 375, “Sustainable Communities and Climate Protection Act of 2008,”** directs the California Air Resources Board to set regional targets for reducing greenhouse gas emissions. The new law establishes a “bottom up” approach to ensure that cities and counties are involved in the development of regional plans to achieve those targets. It builds on the existing framework of regional planning to tie together the regional allocation of housing needs and regional transportation planning in an effort to reduce greenhouse gas (GHG) emissions from motor vehicle trips.
- **AB 441** requires projects, programs, and practices to promote health and health equity in regional transportation plans. It specifically states that, “transportation planning has important implications for the maintenance and promotion of the health of all Californians.”
- **SB 1000, “Planning for Healthy Communities Act,”** requires the development of an Environmental Justice element for future General Plans, ensuring that local governments proactively plan for and address environmental justice when developing their long-term goals, policies, and vision for land use and growth.
- **Local Control Funding Formula (LCFF) legislation (Assembly Bill 97 and Senate Bill 91)** represents an historic reform to California’s educational funding system. LCFF was enacted in 2013–14, and it replaced the previous kindergarten through grade 12 (K–12) finance system which had been in existence for roughly 40 years. Under the new funding system, LEAs will receive funding based on the demographic profile of the students they serve and will be expected to meet enhanced accountability requirements.
- **Proposition 47**, the ballot initiative passed by California voters on November 4, 2014, reduces certain drug possession felonies to misdemeanors. It also requires misdemeanor sentencing for petty theft, receiving stolen property and forging/writing bad checks when the amount involved is \$950 or less.
- **Prop 57, “The California Parole for Non-Violent Criminals and Juvenile Court Trial Requirements Initiative,”** passed by California voters on the November 8, 2016 ballot. The Proposition allows parole consideration for nonviolent felons, changes policies on juvenile prosecution, and authorizes sentence credits for rehabilitation, good behavior, and education.
- **Proposition 36, which modifies elements of California’s “Three Strikes” Law**, passed in the 2012 ballot. The proposition:
 - » Revises the three strikes law to impose life sentence only when the new felony conviction is “serious or violent.”
 - » Authorizes re-sentencing for offenders currently serving life sentences if their third strike conviction was not serious or violent and if the judge determines that the re-sentence does not pose unreasonable risk to public safety.
 - » Continues to impose a life sentence penalty if the third strike conviction was for “certain non-serious, non-violent sex or drug offenses or involved firearm possession.”
 - » Maintains the life sentence penalty for felons with “non-serious, non-violent third strike if prior convictions were for rape, murder, or child molestation.”

II. Policy and Systems Changes

2. Local Impact of Policy Changes. Respondents also highlighted the many benefits they've seen locally as the result of state and local policy wins. (In most respondents' minds, state and local changes were intertwined, and they saw both as a result of the organizing, collaborative work and narrative change components that make up BHC's Drivers of Change.) Youth leaders, community partners and state advocates alike pointed to small and large policy victories that have had tangible local effects in school districts, in city and county government and across many substantive areas, including education, environmental health, land use, restorative justice, and others:

“Locally, I saw a campaign that I directly worked on to implement restorative justice practices within our school system, and that was a policy recommendation that was created and accepted by our school district, so that was a win. Following that, we had advocacy work that happened in Fresno for the indigent medical service program, so that looked like people saying that you can't cancel this program, so that the county would be able to continue that program in some form. That was another successful win when it comes to policy.” (Youth Leader)

“We won a policy – school district-wide, but informed by the work in Boyle Heights – to make breakfast in the classroom available to all students in the first ten minutes of class, particularly in high-needs schools. That's been implemented now for about three years. This policy change had to do with reducing hunger and providing youth access to a nutritious meal at the beginning of the school day.” (Community Partner)

“We got the city of Fresno, through the city council, to approve and move forward a community vision that rezones all industrial, light, medium, and heavy industrial and toxic uses out of the community. It replaces that zoning with office and commercial and small retail, parks, public institutions. This has never been done before. And land-use planning is the biggest issue in West Fresno, where there's really high asthma rates and high black infant mortality rates. The difference in life expectancy between West

One of Many Local Policies to Which Respondents Believed BHC Contributed

Santa Ana's new 'Sunshine Ordinance' includes a number of measures aimed at making city government more transparent. It went into effect in 2013 by approval of the City Council. A coalition of residents and community members advocated for the measure's approval. The Sunshine Ordinance requires public notice and a community meeting at the very beginning of planning processes. This is important so that residents can learn about proposed projects and provide input before the project's plans are completed.

Fresno and their neighbors a few miles to the north is 20 years.” (State Advocate)

“In Merced, we've been able to develop strong relationships with the county staff to address pedestrian safety improvements, and in particular, a project to address concerns that kids have to cross train tracks pretty regularly to get to school. And it's become a very big hazard in the community, and we worked with the county to look at their local funding sources, but also statewide grant opportunities, so that they could get funding to address those priorities.” (State Advocate)

“In Boyle Heights, the most significant achievement is getting people who are undocumented [signed up for health insurance] through the My Health L.A. program. It went from 146,000 people to 200,000, an increase of 54,000 people. It was very important to me, personally, because I am an undocumented person.” (Resident Leader)

3. Factors that Contributed to BHC's Policy Influence. Several respondents reflected on why BHC has had such strong influence on policy. Overall, they credited the unusual combination of

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empowered community members, including young people, allied with strong state-level support in advocacy, communications, political savvy and use of data.

For example, many people mentioned that HC's communications support was incredibly influential in advocating for needed changes. They also mentioned the value of training individuals to communicate a message effectively. For many community advocates, these resources are a new and very powerful way to amplify a message:

“An opportunity TCE brought forth was providing the campaign communication support to get more attention at the public level. Their communications helped us engage with board members (i.e., Board of Supervisors). We created a campaign that elevated the message that ‘Every Student Matters.’ They (TCE) helped us shift the narrative about bad student versus the good student. Having young people tell their stories and experience in schools—they talked about how their hopes and dreams have been crushed because of what they had experienced in terms of school discipline.” **(Community Partner)**

“The communication support has been an important contribution from LA BHC related to two different kinds of initiatives. First, the language has changed from, ‘Teachers have a right to do whatever they want,’ to having to address a systemic condition around how discipline is administered at each school. The communication support has been helpful with that messaging. Second, one reason we were able to fight UHC is because we had communications support.” **(Community Partner)**

“Sacramento Acts did a training for a lot of the BHC grantees and trained us to provide testimonies at the County Board of Supervisors.” **(Residents)**

Several individuals also credited TCE and BHC for recognizing the **importance of having community members present in decision-making**. They described several such activities, including supporting Community Partners in appointments to committees and/or election to public office:

“The city of Merced is working to develop an active transportation plan city-wide, and we worked with a community resident to get her on the committee that will guide the city's process and vote on policy development and implementation. (She's in a position to)...identify priority projects for implementation through that process. Being able to provide support to community residents, to have a seat at the table – a direct vote at the table – is pretty powerful.” **(State Advocate)**

“We were able to get, over the course of a couple years, the Water District to develop an advisory committee to the board about water and waste water issues that disproportionately affect low-income communities, which is our community. A lot of us are now on that committee.” **(Community Partner)**

The power of data was highlighted for its contribution to policy wins. Several respondents called out their new ability to marshal and use data as a particularly important contribution from TCE. They described a range of research activities, including supporting data collection, generating reports with school districts, supporting policy briefs and generating other forms of facts and information:

“The California Endowment and California Community Foundation asked us to help them conduct polling in Los Angeles County about affordable housing issues. When we conducted the poll, it created public understanding and concerns about affordable housing issues in L.A. County.” **(State Advocate)**

“Some of the most powerful work in Del Norte has been school and education related in partnership with BHC and True North organizing network. BHC has worked closely with the school district to analyze their data and spotlight the inequities. These reports help the community collectively decide what's not acceptable. BHC doing that work was fundamental.” **(Funder)**

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“The report called “Creating Healthy Regional Transportation Plans” that we put out was partially funded with TCE money. We published it during a time when legislation had been not moving forward. So, we created it to essentially show what it could look like. This is a good illustration of how information is able to influence. Not through lobbying, but through public education and educating our decision makers.” **(State Advocate)**

Again and again, however, respondents came back to **the power of organizing, allied to BHC’s ability to link organizing to all the other strategies central to community empowerment.** The widespread, ongoing support for organizing and community mobilization is discussed at multiple places in this report; in this context, stakeholders tied it directly to policy change:

“The strongest example would be the passage of the School Climate Bill of Rights in 2013, which happened through the Brothers Sons Selves Coalition. We were able to out-organize the opposition, which included the teacher’s union, and really shift the narrative around school discipline, around youth, investing in youth, and calling out the injustices of the disproportionality of suspensions and locking students out of school for minor issues.” **(Community Partner)**

“Residents have been the lead advocates for things like Metro adopting (a policy related to) affordable housing and a standard on properties and around transit. 35 percent of all developments that are residential are affordable. The passage of Measure A was another policy win.” **(Funder)**

“Bringing those voices forth and organizing parents to support the youth was really critical because parents have seen the issue of suspension very differently from the young people. Shifting the narrative and putting pressure on board members that were archaic in their way of thinking. At the time, a good chunk of the board were former administrators, so their way of thinking was very archaic when it comes to school discipline.” **(Community Partner)**



“Three BHC sites came together to produce a report that proposed to do several things, such as eliminating willful defiance, implementing more justice practices, limiting the role of school police, and more counselors for restorative justice programs. The Endowment resources helped with gathering the data to back up the experience of youth in schools. It very clearly defined the disproportionality of suspensions impacting African American and Latino students, particularly males. The one solution that everyone landed on was that we need to eliminate ‘willful defiance’ because as young peoples’ stories were being gathered, it was very clear that most of the suspensions were based on willful defiance, which could be so many things: you talk back to a teacher; you don’t abide by the dress code; you don’t bring your materials to school, etc. And students were being locked out of learning time, which only helped perpetuate push out. So they developed the “Ten Point Program” that is now called “The School Climate Bill of Rights.” At the end it reflected young people’s priorities. After publishing the report they identified our board champions and waged a campaign. They set a plan with strategies, with tactics, activities, and implemented that over almost a year period to build support to shift the narrative around the issue of school discipline. And, we passed “The School Climate Bill of Rights.” **(Community Partner)**

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B. LESS SUCCESSFUL ELEMENTS

When asked what aspects of BHC's policy efforts didn't work and/or what people would like to see differently in the future, they pointed to several elements and made strong recommendations. Most frequently, respondents said that BHC's community and state level components often are not coordinated sufficiently. They identified three barriers in particular that interfere with synchronizing site-based initiatives and statewide policy advocacy and campaigns.

1. Lack of Clarity about Aims and Methods. At issue here is what's intended in terms of joint community and state-level actions and the process for making it work. Twenty-one respondents expressed confusion about what's expected in terms of combining local-regional-state work to have cumulative impact on major policy issues. They knew that successful campaigns had been launched, but they were not clear about what the triggers had been, when this process was intended to occur, or, in some cases, whether this was actually a unified BHC strategy or a more ad hoc process when different parts of the foundation's funding priorities worked together. Some stakeholders were still confused about "What constitutes BHC?" (i.e., how state-level activities and investments such as Sons and Brothers relate to BHC site investments). The comments about lack of clarity come disproportionately from state advocates (64% compared to an expected 35%):

"The one thing that we can do better is linking the (BHC) policy work at the state level to the local level: to what local governments and local school districts are doing – and how we are giving them the tools to create those local policies that also help advance BHC's goals and The Endowment's goals." (State Legislator)

"We have this cadre of very knowledgeable statewide health advocates and you have the local work that's been taking place in the (sites). But there's still not that really good connection between the two of them. In fact, we were sort of told not to connect with BHC (sites) for a long time. I get that you have to understand and make your own local connections before you can then tap into the bigger system. We have to do that

Policy and Systems Change: Less Successful Elements

1. Lack of Clarity about Aims and Methods (cited by 21 people)
2. Tension about Priorities (cited by 8 people)
3. Frustration by Some Partners about Lack of Inclusion in Decisions (cited by 12 people)

much better given the situation that we're in today, post-election, and there needs to be more of a connection between what's happening at the local level to the statewide and even national level...I think we could've learned a lot from the BHC sites, but we just haven't been invited to participate...I think there was a sense of "We don't want the local folks to be influenced by the statewide folks." (State Advocate)

"It has not been seamless, the interaction between the local efforts and statewide campaigns. That's hard to figure out: how to integrate 14 (sites) that are largely focused on local work into a statewide campaign for Health4All, for example. The statewide Health4All effort was a fairly sophisticated campaign structure. Certainly the BHC (sites) were invited to the big rally days and lobby day, and certainly there was work being done at the local level. But it was not seamless, how to integrate those 14 sites into a statewide campaign. Are there things that we could have done to be more welcoming? Maybe. Is there something that we could have done that would have been (more helpful)? Would that have been the (most productive) effort, given what the needs of the statewide campaign were for winning?" (State Advocate)

2. Tension about Priorities. Several stakeholders who span both state and local work questioned whether the policy priorities that triggered TCE's

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attempts to align state-local efforts were indeed community priorities. They felt that these were in some cases TCE's priorities, rather than the most important items for local leaders and residents. (The campaign for school discipline changes was almost always cited as an exception; all stakeholders agreed that this issue was important locally and that youth voices, youth organizing and local passion were key to legislative success in Sacramento.) It is interesting to note that nearly all of the people who spoke about this tension were state advocates, not community partners.

Conversely, one interesting line of thought was that, out of concern for imposing outside agendas on BHC communities, TCE now limits state advocates' access to BHC communities, even when they could provide useful tools, knowledge or resources. This is one of several areas where we heard conflicting views on an issue:

“There was an over-concern that if you said, ‘This is an issue that’s bubbling up in multiple communities, let’s start jumping on this and connecting communities and connecting statewide, too,’ that there was a concern that it would be interfering with the true local nature of this (initiative). I just think there was too much of a concern. It was almost overly protective of the local-only. It artificially narrowed the work and the success. Take LCFF as an example. Maybe a certain enrollment issue hasn’t bubbled up from that community. But then we’re putting together tools and supports for local groups to do a better job implementing that issue. There should have been an easier opportunity to say, ‘Hey, this might not have been on your key layer screen, but here are these tools. Here’s something you could be working on.’ My sense is a lot of local groups would say, ‘Great.’” (State Advocate)

3. Frustration by Some Partners about Lack of Inclusion in Decisions. As seen below, a few leaders expressed frustration that they were not given access to certain BHC activities. For state advocates, this took the form of confusion about when they could have access to BHC sites and

about how they could best contribute to site knowledge and capacity. This perception was held most strongly by a few organizations:

“In terms of Men and Boys of Color and their policy work, I feel it’s somewhat exclusive. We work with men and boys of color, but ask me if we’ve ever been invited to a Men and Boys of Color conversation and I’ll tell you no. We never have. And it seems like (TCE) carved out that space a long time ago and is very hesitant to include more groups in that space. I think some of it (the exclusiveness) comes from the organizations that they select to lead that work, and some of it is because of funding issues. It’s just very hard to get into that pathway.” (Community Partner)

“We feel very strongly that (in terms of) state and local advocacy, there shouldn’t be such a strong separation. I would have liked to see and still want to see more integration of a statewide focus within the BHC (sites), and specifically that would mean even embedding groups like ours within the BHC (sites). I’ll choose my words carefully here, even though it’s confidential. We had tried to get involved more. It was sort of like, ‘No, no, no. We’ve got a process for that,’ or, ‘There’s a couple groups doing that,’ or, ‘We’ll decide that.’ I still think that if there’s a group working on LCFF or health access issues or school-based health issues or school discipline – you name it – that having that group working on the ground with the local groups is going to strengthen coordination and statewide policy and advocacy. I think there was a concern – and I think that it was misplaced that...if a group came in and said, ‘We’re going to work on these three issues,’ that it would be disrupting or taking over the local roundup, but that’s only if it’s done poorly. If a group comes in and is really listening, then it could have (helped the local leaders).” (State Advocate)

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C. RECOMMENDATIONS FOR CHANGE

Stakeholders were unanimous in urging TCE to continue its focus on powerful policy and systems changes. They recommended several types of changes for the future: (1) developing a clearer and more intentional approach to state/local alignment; (2) expanding the networking among the multiple components of BHC; (3) building local capacity to participate in the work of policy advocacy and systems change; and (4) a stronger focus on implementation.

1. Develop a More Intentional Approach to Alignment and Communicate it Effectively to all BHC Partners. Eleven stakeholders suggested that TCE is now in a position to be even more planful and intentional about how BHC partners work together. They recognized that policy opportunities can't be predicted, and that some rush and unpredictability are inevitable, given how policy develops in the real world. However, they suggested steps that could help people prepare for this work and have a more complete, broadly-owned sense of how local, regional and state partners could work together.

Several people suggested that a **regular process of strategy development** around joint community-state activities would be useful, involving regular meetings to plan strategy annually or for multiple years and set policy priorities. For some, the results of the national election and likely changes in federal policy added urgency to this task. And, as described in the third quote below, people felt that this type of preparation would create more of a "ready capacity" among partners to respond quickly with policy advocacy when needed:

"Now more than ever, this is the moment – this is our time to really demonstrate our advocacy capacity and power that TCE has been investing in for the past five years. I would definitely start there, and from there I would envision a five year strategic plan on what are the major goals that we want to set for ourselves both regionally and statewide, and engage in a community-grounded process with TCE's grantees on their vision for how this work can grow."
(State Advocate)

C. Recommendations for Change

1. Develop a More Intentional Approach to Alignment (*cited by 11 people*)
2. Provide More Networking Opportunities among Partners (*cited by 15 people*)
3. Build Local Organizational Capacity to Participate in Policy Campaigns (*cited by 13 people*)
4. Focus on Implementation (*cited by 9 people*)

"One of the things (I suggest) is bringing key (local) organizations and activists together and coming up with a plan, like strategy plans and meetings, (asking) on the local level, "Okay, Kern, what is most important to you when it comes to education reform?" It's about getting a picture of that based on each region, and then bringing people together for the statewide plan. TCE has had several conferences, but a lot of times, we don't have the time to actually have a facilitator lead us through a planning process, or they feel like they know what it should be, and so they just bring us together to say this is it – like they already have the decision made about what should happen, and so they bring us together to then buy into it." **(Community Partner)**

"(I suggest) an annual consult at each of those levels on policy priorities for legislative sessions. We would create a team that is comprised of neighborhood and regional and state (people), that could be called upon when policies are in that back-room negotiation, where there could be a quick gut check on some points that maybe had not been discussed before, so that at least there's some sort of expanded circle around that decision-making in those tight moments. So folks that know, they get a text, like, "Hey, heads up. I'm going into this

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meeting, and we're going to be talking deal points. I may be sending you a message that I need to respond to right away," and being able to have that rapid response. Ideally, those folks are connected to the bigger circle at the regional and the neighborhood level." **(Community Partner)**

"I'm wondering if they could just have a strategy table. Maybe pick two or three organizations that they consider their statewide policy partners and just have one meeting to set up some infrastructure and then have some regular forms of communication that way." **(State Advocate)**

Eight other respondents emphasized a theme that will be discussed in more detail in Section VI: **the opportunity for cross-site learning**, in this case specifically around "how to talk about policy, about systems change." These stakeholders hope that TCE can move even more powerfully to not only provide a framework for community and state partners to work together, but to accelerate learning among the sites about how best to do this:

"I would see if there are any common themes or lessons learned from the different BHC places and if there are common strategies that are successful, and whether there are barriers that, if we removed them at the state level, then this would unlock X, Y, and Z. There are opportunities to use commonalities among the BHC communities to see what could be done at a state level, either through advancing a particular policy, or funding a particular strategy or a particular piece of research – something that could be done at the state level to move the work of the places forward." **(Community Partner)**

"What an opportunity to get these 14 sites in California to come together! We know that they believe in the framework that they've been implementing, so it's really action time. Let's have a conversation because the building blocks have already been built, right? They know how to talk about policy, about systems change. They can identify threats and they can marshal

assets. The sites are more ready than other places because of the work they've been doing. The lasting legacy of any foundation initiative is the people you leave behind, the skills they have and the passion that gets ignited participating in these initiatives. To me, this is the true test. Our world has changed. BHC started in a political environment that was friendly to public health and to poor people and to people of color. It's now a whole new planet. How do you pivot from that? The opportunity here is that we are 14 sites. We have common goals. How do we protect, defend, advance?" **(Funder)**

While most stakeholders urged developing a more explicit strategy for a range of policy issues, one state advocate recommended that TCE **seize the opportunity to advance specific policy agendas**. For example, issues around housing and gentrification were seen as an area ripe for developing a statewide strategy for BHC:

"I would just start with housing and gentrification, where actually we need a statewide strategy and not just a localized strategy, and the lack of attention to what a statewide strategy could look like has been a lost opportunity. You could go through a whole host of other examples of possibilities. I think the Boys and Men of Color work, which has leveraged participation and leadership from a BHC site, has benefited enormously from that collaboration and could be even deeper and even more robust than it is, but it is an example of what other work could look like." **(Funder)**

One person suggested that greater clarity for the plan for state-local alignment had to start with even **greater clarity within TCE about how the foundation wants to see the balance between state and local investments** and even greater specificity about the approaches that will lead to cumulative impact from these investments:

"Well, for one thing they (TCE) need better alignment internally. They need to figure out what their commitment is to BHC engagement at the state level and that

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may include additional resources for BHC sites. You've got to think about, okay, so what might that look like, and what kind of resources are required? What's our internal commitment to this and what does it mean in terms of how we need to work differently internally? The lack of state-local alignment has in part come forth because of the lack of internal agreement and internal commitment. TCE has to start by saying, okay, we've had these incredible impacts at the state level. How much of them have come from BHC site engagement? How much could they have been enhanced by more? For that matter, as we think about the needs for statewide policy change over just the next two years – but you could go to four or five years – how are those related to the experience we know about and insights from around the state? How much should we begin to think about what engagement from sites might look like and then where else are we going to have to make investments? What other organizations (must we involve) to get to the impact we're seeking?" (**Funder**)

Finally, several people suggested **frameworks or approaches that TCE could consider, which they thought would give greater clarity to what is meant by state-local alignment.** As illustrated below, one person suggested more explicit use of a

collective impact framework, along with more explicit application of critical race theory. Another outlined an approach where a framework of place, policy, results and collaboration would be established, and then sites would develop their own plans for advancing policy change within that framework, forging alliances as needed to bring about change:

“I love the commitment to places, (but) I think you can commit to places without being so narrow – the narrow being, “These are the 14 and that’s it.” I would commit to place and policy as the two paradigms that drive the work. Then I would allow sites to figure out how they want to connect across places to drive work at the state level within the existing structure and develop budgets that allow them to do the work. You just have to put some of this back in sites’ hands. At the same time, TCE can say this is the statewide infrastructure that we’ll be providing you to be able to get to the end game. Then, if I’m in Fresno, I’m like, “Okay, we have this pot (of funding), and we’ve got to figure out how we get to these outcomes.” That could be the beginning of a way forward that allows for people to drive the work in a way that is more reflective of their will and the leadership that exists within the communities. It’s that kind of objective role that allows the foundation to say look,

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we've created this great body of work in all of these communities. Now it's time to take it to the next level. How do we do it in a way that we don't get in the way and allows the community to be its best self?"
(State Advocate)

- 2. Create More Opportunities for Networking among Partners.** This was the most frequently recommended strategy to improve alignment: creating more opportunities for state and local partners to get to know one another, understand their respective ways of work and establish the personal and trusting ties that are essential to work intensely together towards a common aim. Stakeholders felt that these shared experiences – which could be meetings for knowledge building, skill development, peer sharing of lessons and strategies – would build capacity for everyone involved.

"You know, I would like to see more opportunity for regional and statewide partners to collaborate. And not just by the BHC news blast or the BHC Facebook page, but more convenings in which key stakeholders from communities and heads of organizations can meet with one another and have strategy sessions. There's so many people throughout the state doing wonderful work, but at times we're siloed. So how do we really develop this robust network of freedom fighters that are actually vested in this work?"
(Community Partner)

"So much is building trust and communication. When you really get to know somebody in a non-work setting, it disarms people, and it helps people get to that next level in their relationship and communication. I think to do more gatherings in more intimate ways. The Sacramento trips and the lobby days are very policy-focused. But let's just get people together, taking groups from northern California, southern California to Central Valley on a camping trip or a whitewater rafting trip, where it's more personal bonding and friendship and becoming more than just hands-off colleagues."
(State Advocate)

"(With regard to the April 2016 convening by TCE): It was a big production. I think it gave

all of us who hadn't been a part of things a much better sense of what's happening and an opportunity to meet really extraordinary people. More gatherings like that would be really helpful. Even if we aren't going to end up working on the same thing, (it is useful) to build cohesion statewide just in the knowledge of what's going on, so that we can do our best to support one another or at least not step on each other's toes."
(State Advocate)

- 3. Build the Capacity of Local Organizations and Leaders to Participate in Policy Campaigns.** This recommendation has several parts. Most of all, stakeholders recognize that if local organizations are to devote more time to state-level advocacy and systems change, they need dedicated staff resources for this purpose. Even when the local contribution to campaigns involves making sure that parents, youth and other community residents are present for testimony or contacting policymakers, this is time-intensive work, and local organizations need expanded resources to do it well. In addition, several respondents cited the need for more skill development for local partners in order for them to more fully understand the policy and advocacy process and how local voices can be most effective:

"It goes back to really building local organizational capacity to participate meaningfully and sustainably in various initiatives. I know we are able to do it, but it stretches us. (TCE) should think more about, "What do organizations need to pivot (to this advocacy work)?" We're entering a time when we're really going to have to pivot. To have strong collaborations you need strong organizations at the local level."
(Community Partner)

"(In response to being asked about how to improve state-local alignment): I would be remiss if I didn't say we need more resources to actually transport people up to Sacramento. We have legislative field offices in our community, but it's definitely not the same thing as actually going up to Sacramento and doing rounds at legislative visits. The other

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piece is having tours, listening sessions and helping bridge relationships with the local field office when legislators are in town. That's also a resource question of being able to support that kind of work. I know The Endowment did support, or at least was able to get the state legislators to do, local hearings around the issues of Boys and Men of Color. Something to that effect would be helpful in connecting the neighborhood, regional, and state-wide work.”
(Community Partner)

Four stakeholders urged that TCE look closely at which sites were best able to participate in state-local advocacy and **think about needed capacity site-by-site**. One person observed that the strongest participation in state policy wins involved sites where the working relationships between local and state leaders were well-established and where local organizations had the experience and time to do this work. She and other stakeholders recommended that TCE should look at the participation of sites in state policy and advocacy activities site-by-site and determine whether these joint activities can be spread more broadly and consistently across them all:

“ Sometimes statewide folk need go to those rural places. You wonder why they can't get folks out of Merced or Fresno or Kern County. Go to those places where they are and really spend time and invest there and build – you've got to build relationships.”
(Community Partner)

While most of the recommendations about building capacity were for local organizations, two state advocates urged that TCE **invest more in the capacity of state advocacy organizations**, both those that now have capacity to work locally as well as those whose work is carried out through state coalitions:

“ TCE should invest in the capacity building and structure of (state-level) groups like ours, who are also at the local level and who have the capacity to do neighborhood level organizing and connecting that to the state advocacy. That's where the strength is, because you can connect the very strong community priorities, (identified through)

organizing to be able to effectively represent their needs and their values at the state level. Investing in those structures is key to be able to advance the goals of the sites. And, there's a role for statewide partners that don't organize or aren't at the local or regional level: what their added value is, and how they support local and regional organizations, should be determined in partnership with local organizations. There is so much that we could be doing if we had more investment in our infrastructure and our capacity, to engage at a deeper level than just having one staff person in Sacramento carry the voices in the Valley, of East Coachella Valley and the San Joaquin Valley.” **(State Advocate)**

4. Focus on Implementation. A number of respondents who discussed policy changes mentioned policy implementation as equally important as enacting policy. They recognized that policy wins are only one link in a chain of actions needed to actually see results for people and communities. Some respondents provided examples of their local BHC initiative already tracking implementation, and one person (below) emphasized the attention to race, gender and equity that can be brought to bear on policy implementation, as a result of BHC's involvement:

“ The implementation, just like organizing, takes a long time. And so we've been engaged in a campaign to create a healthy development guideline. It's a tool that the planning department has to engage with new development projects that come into the city that developers have to use as a guide that has a health equity lens.”
(Community Partner)

“ The way the kind of Local Control Funding Formula stuff has rolled out, a lot of BHC partners have been central in making sure that things like race and gender and discipline metrics are taken into account when school districts are making their school improvement plan, their local control accountability plan.” **(State Advocate)**

“ TCE has played a fairly central role in the state setting up the Health4All policies and

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Health4All committee that help coordinate efforts between different state agencies. They have a whole set of policies that have been established so that more and more agencies and public programs take a look at state decisions through a health lens. That's very important. One of the things that TCE has done that's very important is we're not just treating the symptoms but we're looking up stream at some of the problems." (State Advocate)

Other respondents, however, argued that policy implementation had not been a sufficient focus in BHC to date. Nine interviewees spoke passionately about how important monitoring and implementation activities are and how they've been given short shrift in BHC. They recommended that in the years ahead, BHC devote more attention to the challenging work of implementation, including changing the culture of local systems/agencies responsible for the new policies. The call for stronger focus on implementation came disproportionately from state-only advocates (57% compared to an expected 35%) which is interesting because one might assume that local partners are most interested in implementing policy on the ground:

"TCE is on the one hand saying, "We passed this amazing policy. Suspensions have gone down. We now see restorative practices in all these schools." But then families say, "We're trying to get them to implement the policy,

but they keep throwing up these excuses and barriers." Or "Yeah, they might implement it, but they're really undermining it at the same time." Implementation seems to be the part of BHC that's had the least investment. For example, the "Schools, Not Prisons" tour was good, but would the foundation ever throw the same resources behind the real work to get these things implemented? The work that isn't as sexy, doesn't capture the attention of the press? Implementation is very rich; it highlights the major structural inequalities and biases that we're all contending with nationally. Someone has to manage the inevitable resistance and create massive cultural change inside institutions. It's a huge opportunity to create a new generation of leaders who can really take on the complexity of seeing these victories stick." (State Advocate)

"After there was a policy victory, there wasn't much thought given to how do you do implementation in a way that can also be a campaign, it can also be about youth power and community power, parent power. That's as important as getting the policy win. I've been going into LA schools and now, three years after the school climate bill of rights passed, none of the students I talk to know about that." (State Advocate)

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C. RECOMMENDATIONS FOR CHANGE

Recommendations for Further Strengthening BHC's Impact on Policy Change In the Next Four Years

Looking forward, respondents recommended steps to ensure that the policy and systems change focus of BHC is stronger in future years and addresses several of the gaps that people identified as they looked back at experience to date. They urged TCE to:

- Develop a more intentional approach to community-regional-state alignment for purposes of policy education and advocacy, and communicate it more effectively to all BHC partners.
- Continue to seize the opportunity to advance specific policy agendas, but prepare partners more fully for this work by creating more opportunities for networking among partners in advance of needed actions so that they understand issues more thoroughly, recognize this different way of work, and build strong relationships so that they're ready when needed.
- Build the resources and capacity of local organizations and leaders to participate in state policy campaigns and activities. For example, this could entail supporting organizational time for this purpose or dedicating staff for these activities.
- Focus much more strongly within BHC on policy implementation in the coming years, as this will determine whether policy wins actually translate into positive impact on people's lives.

III. Partnerships and Collaboration

Many stakeholders talked about partnerships and collaboration as a significant strength of BHC. Given BHC’s ambitious health equity goals, collaboration is seen as essential because single actors or organizations, working in isolation, could not be expected to accomplish them.

At the same time, some respondents had strong criticisms of the ways in which some partnerships manifested within BHC. These respondents felt that some local partnerships were forced, and thus a barrier to change. Stakeholders also used the theme of partnership to urge that TCE look closely at its own ways of partnering with state and local stakeholders.

Here, we look first at the recognized accomplishments and then at the areas where people criticize current arrangements and recommend changes for the future.

A. ACCOMPLISHMENTS

Forty-two of the sixty-two people interviewed (68%) identified “partnerships” or “collaboration” as one of the major successes of BHC’s first half. They support the premise that individuals and organizations joining together to develop and implement strategies will create a far greater likelihood of achieving BHC’s health equity goals than if single organizations or leaders act alone.

People talked about multiple benefits of collaboration, including expanding available resources and deepening impact by having a broader network of advocates. They credited TCE with setting the stage for collaboration by requiring it in grantee workplans, resourcing it and providing technical assistance to support it. Finally, people thought partnerships were most successful when:

- Members define the problem together, collect data and work on coming up with strategic solutions together
- The work is grounded in community priorities around a common frame
- Relationships are established and built on trust
- Members have complementary skills and key decision-makers are at the table

- The Partnership effectively bridges the services—advocacy divide
- People participate in the spirit of “Let’s figure this out together,” rather than “We have all the answers.”

The most frequently described aspects of success in this area are described in more detail below.

1. The Multiple Benefits of Collaboration.

BHC stakeholders found that working together increased their access to each other’s resources and made them a stronger, more united front in their advocacy work. Joining forces and creating partnerships that crossed organizations working on single issues allowed people to broaden their base and deepen their impact. One state-level stakeholder described it as an advanced form of social capital that was instrumental in many of BHC’s policy victories:

“All the organizations – because we’re part of the Hub – we’ll support each other’s endeavors and members, so the Board of Supervisors knows that it’s the community that wants this, not just one particular organization that has an agenda or a particular interest.” (Resident Leader)

“I have met incredible folks in eight years. Prior to that, I had never had an opportunity

A. Partnerships and Collaboration: Accomplishment (cited by 42 people)

1. The Multiple Benefits of Collaboration
2. How TCE Set the Stage
3. Ingredients of Successful Collaboration
 - Common frame
 - Relationships built on trust
 - Complementary skillsets
 - Bridge the service-advocacy divide

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to work with or to know that these were resources that were available. Ever since I became part of BHC, the increase in collaboration really moves the needle forward for us in the community. Our members really benefitted from these relationships.” (Community Partner)

“One of the outstanding portions of BHC ... had to do with coalition work. When we work together as groups and individuals, more is accomplished.” (Resident Leader)

“Once we collaborate with each other, we push each other forwards. Sometimes, there’s certain battles that certain organizations can’t battle on their own, and that’s when we help. It’s just giving each other a hand when we’re trying to advocate and help them with the work that they’re doing. They support our work, we support their work, so it really works well when we’re actually working together and not so much dividing, or just like, “I’m just going to stick to my site, and then you do whatever you want,” but it’s like helping each other because at the end of the day, we are a community, so we have to push each other forward and help each other in any way that we can.” (Youth Leader)

“My general sense of things is that the BHC tables across the state are very effective at coordinating among organizations that probably wouldn’t naturally coordinate at that high of a level and therefore have more leveraged impact across multiple organizations in specific regions. Leveraging the work of member organizations to have higher impact is probably one of its biggest accomplishments.” (State Advocate)

2. How TCE Set the Stage for Collaboration and Partnerships. Respondents agree that BHC incentivized collaboration by providing the financial resources needed for their participation in coalitions and by connecting them with other entities that were part of the initiative. By requiring collaboration as a prerequisite for funding, TCE basically mandated this way of work, but then supported grantees by offering

funding and technical assistance to strengthen its operation.

BHC’s Hub structure of a central, staffed entity that brings organizations together to work on joint strategies also helped grantees step up to this way of working. While some stakeholders criticized various aspects of this structure, people also said that the collaboration it engendered was greatly appreciated:

“Connecting us – not only Long Beach, but now Boyle Heights, Los Angeles, Fresno, San Francisco, San Diego – to see that this growth was not just local, but we’ve grown at a state level. So now whenever there’s an initiative or movement, we’ve been able to travel to Washington D.C., to Sacramento, Oakland, different places, where we can raise our voices even higher.” (Resident Leader)

“Everybody came because they wanted to know what kind of funding they were going to get. But the more this thing began to flesh itself out, you saw that people really believed in it and there was more willingness to work together.” (Community Partner)

“Not only funding, but the amount of awesome connections and partnerships TCE has helped us forge with organizations through BHC has been game-changing for us in terms of building coalitions and getting a lot accomplished.” (State Advocate)

“It’s allowed groups to participate in these broader coalitions where they both get to see other perspectives but then where they also get to shape an agenda that has health and equity along with other values, like broad environmental protection or climate protection. You need this broader coalition because all the issues are getting so multidimensional. TCE has very much understood this. And so they place collaboration as a critical component of work plans. And I think it’s essential for the larger movement in the long term.” (State Advocate)

3. Ingredients of Successful Collaboration. People talked about a number of ingredients that helped create effective partnerships that held together

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over time. They mentioned the importance of having a common framework for their actions, building trust and fostering enduring personal relationships among members, playing to the strengths of each member organization, and bridging the gulf between service providers and advocates:

- **The work is grounded in community priorities around a common frame.** BHC prompted cross-sector collaboration by helping groups view their work through a common lens and establishing health equity as a thread running through their efforts. This allowed groups to move beyond a single-issue focus to collective planning and action:

“BHC has created unity. The unification that we were so eagerly awaiting in Long Beach, now being in a unit -- working on the vision that we have for the community as a unit -- has been magnificent.” **(Resident Leader)**

“Since the beginning, people came together to talk about a vision for our site to get to a healthier community. Seeing it through a health lens had not happened in quite that way in the past. This was the first time where residents, young people, and organizations came together to talk about “how do we build a healthier community.” All of the strategies and goals were grounded in this framework of health.” **(Community Partner)**

- **Relationships are Established and Built on Trust.** Respondents discussed the importance of starting from a place of humility; facilitating regular, ongoing communication; and taking the time to build trust. They said this phase often involved establishing personal relationships and connections as a way to ensure the partnerships would endure:

“Having that relationship with the school [has been important to sustain our partnership], having that strong relationship with those key personnel, and having that trust to try things and not be afraid.” **(Resident Leader)**

“It’s provided the opportunity to promote all these organizations to come together and share ideas and support each other. One

example is an Active Transportation Project we did in Kern where this youth had the idea to bring infrastructure, sidewalks, road improvements, lighting to the neighborhood. We brought it up to the organizations who knew how to get started, and the mindset was “What can we do to support you?” It wasn’t, “Oh, well, that’s not ours.” No, we shared. Because we were all able to come together and trust each other, the project was a success. We got \$5.6 million for that community.” **(Youth Leader)**

“I would never ever in my life have worked with this one non-profit...without BHC because they have a history of kicking off immigrant construction workers from work sites after the night of civil unrest because they were blaming them for taking jobs. But now I’ve been able to build a good relationship with one of their leaders and he’s a trusted ally and friend. I would have never done that without BHC. We’re finally at the point where we can really see the strength of this collective group.” **(Community Partner)**

“We started doing things like having icebreakers at every meeting. And then we started having lunch with these people. We’d go to a restaurant and enjoy meals with each other, and then we would do potlucks. And we really built the relationships with one another, to the point we liked each other, we wanted to see each other. It was like, what do you mean, we can’t have a meeting every week? We need to, we need to see each other, yeah, to that point.” **(Community Partner)**

- **Members have Complementary Skillsets.** Participants frequently talked about valuing partnerships that allowed them to support each other while playing unique roles. They recognized that different people representing different organizations had specific skills, talents and orientations that, if used properly, could contribute to the group process. It was often cumulative skills brought together that made for the most robust and longest-lasting collaboratives:

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“I think collaboration has been one of BHC’s strengths. For example, we formed this collaboration between these three community based organizations where we were able to do the same type of work but our focus at each organization was specific to the different language communities: Spanish; Hmong; and Vietnamese. Collectively, we can all come together and support one another, but individually as organizations, we can cater our programs to those specific communities.” **(Resident Leader)**

“A strength of BHC is not just bringing everybody together but it’s also with different skill sets. There are organizations that are more skilled in one thing like legal assistance. And then another two are very strong with the organizing component. And then there are others who provide direct services who are able to identify issues and clients or impacted individuals for campaigns.” **(Resident Leader)**

“I really like the system that we’ve set up in our four teams, because it doesn’t force you to be the expert of everything. Instead, it builds an alliance so when the schools team needs bodies, we are briefed and given talking points on what the issues are and how we need to support them. But that doesn’t make me feel overwhelmed, in the sense that I need to know every single little thing that’s going on. It allows us to support one another, while still being strong in the area that we’re each working in.” **(Community Partner)**

- **Bridging the Service-Advocacy Divide.**

A number of respondents referred to the bridges built between service and advocacy organizations as a key element of collaboration successes. When this was done well, it was an important ingredient in helping people create and sustain productive partnerships. As we will show later in this section, an equal number of people mentioned that this was still a problem and that it did not always go smoothly. But here, we report on the advances noted by bringing service providers and advocates together in some sites:

“By attending these BHC meetings, I see the bigger picture: that the work we do informs the work that other folks do. I understand now how the dots connect and so I’ve become more involved in advocacy versus purely direct services.” **(Resident Leader)**

“If you just had organizing groups or service providers in the room, that’s one thing, but the fact that you have a combination of the two and it ranges from very traditional service provision to hardcore direct action organizing, I think is an important accomplishment. That doesn’t typically happen.” **(Community Partner)**

“It’s definitely been challenging to bring together organizations that do campaigns and organizations that do service provision, and folks that do policy, and then have a charge of doing policy campaigns together. That’s been challenging, because it’s not in everybody’s model to do community organizing and engage in policy work. But I think the upside is the network and the connections that we’ve built.” **(Community Partner)**

- **Finally, several people noted that they thought their collaborative was successful because it operated with humility and openness.** Instead of posturing and acting like one had all the answers, people approached the collaborative in a spirit of “Let’s figure this out together.” With that attitude, interviewees believed that they were able to accomplish their goals more readily than if there were competitive or condescending attitudes prevailing:

“Our [BHC collaborative] is really good at being a thought partner and entering a space from a humble position, like, “Let’s learn together.” They really are very good partners in that way. One of their biggest strengths is that they come from that place of integrity and sensitivity in not having all the answers. They’re like, “Okay, that’s a good question; let’s figure it out together.” **(Community Partner)**

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B. LESS SUCCESSFUL ELEMENTS

While many respondents' recognized how much BHC had fostered useful collaborations, other people held strong opinions that, in some instances, the collaborations and partnerships within BHC were not as effective as possible. Respondents described some collaborations as "forced" rather than organic, and said that this can interfere with their effectiveness.

1. Forced Collaboration. A significant number of respondents (twenty-eight people) thought that TCE was too prescriptive in requiring unnatural alliances at the local level, rather than recognizing and supporting genuine, often existing collaborations of people and organizations working together on the same goals. Not surprisingly, these comments came primarily from community partners or those who had some connection to individual BHC sites (68% vs. an expected 42%). These respondents talked about "organic collaborations" as preferable to those required by TCE, identifying the following factors as critical considerations:

Who's at the table? People observed that, in their view, TCE and Program Managers decided who was at the collaborative tables created for BHC in local sites instead of letting local leaders, who knew all the relevant players, determine "who should do what" based on their particular strengths, interests and track records. People commented that coalitions were formed based on who was being funded, rather than who was having a specific and positive impact in the community. As a result, people complained that too often the wrong people were at the table, people without the right skill sets or without the strong commitment to what BHC is trying to accomplish:

"TCE controlled who was invited to the table. Based on what? Maybe because the Program Manager liked one of the people working there, as opposed to thinking about the capacities and skill sets that each organization has. I wish they would have thought more about who should be at the table, what are the strengths and weaknesses, and how can we leverage one another's strengths."
(Resident Leader)

B. Partnerships and Collaboration: Less Successful Elements

1. Forced Collaboration (*cited by 28 people*)
 - Who's at the table?
 - Right mix of partners
 - Recognizing the power dynamic

"In the beginning -- and even in some instances now -- the collaboration is not always organic. It is the Endowment that has often decided the makeup of the collaborative: "We're going to give this organization a grant and ask them to join this workgroup or work on this campaign." A good part of it has been orchestrated by the Endowment. That's been a challenge."
(Community Partner)

"If you are working on Health4All, then the set of partners that you want to bring to the table may be different than if you're working on school discipline, or land use. There is some benefit to bringing in some people who wouldn't normally be at a table talking about a soda tax. Because TCE put together a table in these various communities to work on such a broad landscape, by definition that table is a bit unwieldy for any given issue. You have this BHC coalition talking about health so broadly that it has a lot of different actors. So it's hard for groups who want to get into specifics to break into that table."
(State Advocate)

"The other place where things have fallen short is in some places partners were chosen who had neither the values alignment, the cultural capacity nor the skill sets required to take on the roles the foundation asked them to. So when you ask a service organization like a YMCA to take leadership in a process that's about voice and power and organizing when there's not the capacity in that institution --

III. Partnerships and Collaboration

yes, it has the capacity to write a grant, hire a person, and have a personnel policy. But that doesn't mean that there's any capacity to lead or anchor a social change process." (State Advocate)

Getting the right mix of partners to accomplish systems change. A number of people homed in specifically on the problems that resulted from the mix within BHC of many types of partners, especially when the goal was improving a public system. Some Community Partners felt that this compromised their ability to press as hard for systems change as they would like to:

"I'll never forget, one day that one BHC lady walked in and said this is not about services, folks. This is about systems change. And I was like wow, that's about time, but then you realize wait, everyone is still in the room, including the service providers, including the school district, the mental health providers, so we really can't talk systems change any more." (Community Partner)

"How can you strategize and move a campaign if you have your target -- usually government agencies, police departments -- in the room all the time? TCE did it this way because they wanted to incentivize these folks to embrace the change, but all they really did was enable their bad behavior, and give them an insight into our strategies." (Community Partner)

Recognizing the power dynamic. Several people commenting on the foundation's prescriptiveness called this out as an issue of power dynamics. While recognizing that this prescriptiveness is an inevitable dimension of relationships between foundations and community partners and grantees, these speakers expressed a hope that TCE would examine its power dynamics with communities and with state organizations, especially given what a commanding role it plays in all aspects of BHC:

"The power that comes with being a grant maker has clouded all sorts of dynamics without enough recognition on TCE's part about how much their power is really the root of their "leadership" as opposed to how it might have emerged if they were just another



player. That's been problematic in many sites at different times. There's a lot of chatter in the community about being less than happy about not having any ability to actually have that conversation. For TCE to take stock of that would require them to recognize that there really is a distance that exists between them and their colleagues and partners. Being so embedded in these 14 communities means they have more power and a deeper level of engagement than they would normally have. It's the power dynamics on steroids. I don't think they've done enough to understand their own power dynamics, to unpack it, to reflect on it and potentially change some of the ways that they work." (Funder)

"It sometimes seems like a handful of TCE staff and program managers do acknowledge that power dynamic, but a lot of them don't." (State Advocate)

III. Partnerships and Collaboration

C. RECOMMENDATIONS FOR CHANGE

Recommendations for Building Partnerships and Collaboration in the Next Four Years

Recommendations in this area were of several types. Overall, people commented that they'd like to see even more powerful collaboratives and coalitions for systems change in the second half of BHC, and suggested, as ways to accomplish that:

- Ensure that local collaborations are not forced, are strategic and have the right partners at the table to accomplish local aims.
- Invest selectively in organizations with the track record to accomplish systems and policy goals and ensure that they are the partners represented in collaborations and partnerships, so that there is common purpose in achieving health equity goals.
- Build long lasting strategic alliances by convening and empowering networks of organizations to advance policy and systems change, united by a common purpose.
- Connect the state level organizations working on BHC even more directly to the organizing infrastructure being developed in BHC communities so that, together, these become an even stronger statewide force.

“I'd like to see TCE build more long-term strategic alliances and less purely tactical ones during the second half. There's a nice opportunity now for them to sit down with BHC statewide and map out how our organizations are going to strategically align over the next 4 - 5 years.” (State Advocate)

“In the first five years there was a lot of emphasis on building individual capacity and bringing groups together. Now they need to be much more deliberate about getting those groups to achieve systems change. It's not enough if we have 200 groups that have increased capacity as individual atomized entities. It only makes a difference if that capacity is used to impact change.” (State Advocate)

“BHC cast a very wide net when it first got started. You had sites that had 40, 50, 60 groups involved in various capacities. Sometimes it felt like the groups had such disparate theories of change and disparate approaches that it was difficult to create something cohesive. So I would suggest in terms of the next five years that the foundation create a critical mass of groups that have sufficient commonality to be able to operate collectively, rather than think we have to have everybody at the table at the same time.” (State Advocate)

IV. Narrative Change

“Their narrative change work is one of the best things that TCE does. It includes their campaign machine and their media savvy machine. The tagline ‘Health Happens Here’ is brilliant. I know people are using it and they don’t even know where it came from. That branding has been really done well. It’s terrific for those communities and for TCE. And, I have to say, for any health funder, for anyone working in public health and community health, ‘Health Happens Here’ helps all of us. So it invites the conversation. It changes the chatter around what health is and the fact that it happens here. (FUNDER)”

Respondents’ comments about narrative change reflected an unusually strong consensus: approximately 80% of the people interviewed thought that TCE’s willingness to raise the visibility of health equity and invest in it over a ten-year period was changing the understanding of health in California. The only significant group with some negative observations about their experience with narrative change were young people participating in focus groups. They felt that narratives were sometimes imposed on them, when they would have preferred to tell their own stories.

In this section, we look first at ways in which narrative change is viewed as a success by local and state partners, and then consider the comments of young people who do not feel in full control of their own narratives.

A. ACCOMPLISHMENTS

Community and state-level partners alike thought that BHC has been particularly successful in changing the discourse around health to include the social determinants of health and to provide an equity lens. Respondents believed that the health equity frame not only led people to think more broadly about health, but helped build public and political will for policies that advance health equity. Several people observed that California is ahead of other states in this regard and credited TCE with this accomplishment, noting that “health literacy” among state elected officials and policymakers is, in the words of one respondent, “unparalleled.”

Respondents’ comments about narrative change point to three achievements in particular: (1) providing a stronger focus on equity, (2) gaining recognition for a broader view of health beyond traditional physical health concerns, and (3) success in changing hearts and minds on issues important to the well-being of the residents of BHC communities. The majority of the comments about narrative change came from state advocates, with fewer coming from resident leaders, youth leaders and other community partners.

1. A Stronger Focus on Equity. A number of people noted that TCE had helped create a stronger focus on equity in health policy discussions in California than in the past. By putting health equity at the center of BHC, TCE has engaged many more people to use this lens as they think about creating a just, fair and inclusive society in which everybody has the opportunity and resources needed to thrive. Respondents pointed to many examples of equity as a dominant theme in BHC activities, communications and campaigns:

A. Accomplishments (cited by 49 people)

1. A Stronger Focus on Equity
2. A Broader View of Health
3. Changing Hearts and Minds

IV. Narrative Change

- “ We have the “Every Student Matters” campaign in Long Beach, – it doesn’t matter what color you are, and everyone has the right to a quality education.” **(Resident Leader)**
- “ The stories that our young people write are what has done a lot of narrative change. This is why we’re here, and it’s going against all this stuff that we hear in the news. They’re so wrong. We expose the stuff that nobody else is talking about. On our website, we’ve talked about the child abuse that happens within foster care. A lot of young men who are growing up without a father and what that experience is like, being forced to turn to the streets, these are the stories that are really starting to create that narrative change.” **(Youth Leader)**
- “ I’ve been in a meeting with the city planner, telling them that they needed to be more equitable in their investments, and he said, “So you mean to tell me I need to do everything on this side of town that I do on that side of town?” and I was like, “No, you need to do more for the side of town that’s been least invested in.” **(State Advocate)**
- “ (BHC) has changed the narrative around health equity, absolutely. It’s changed the narrative from a top down narrative to a youth perspective. Health equity is not just one blanket approach. The needs of young people – especially diverse young people from different communities, racially diverse, socioeconomically diverse, diverse in terms of sexual orientation, disabilities – the needs of those communities are varied. And what BHC has done is created a platform for each of those different groups to talk about health equity from their own location and across those different locations. And without BHC there would actually be a really big gap in the health equity conversation.” **(State Advocate)**

2. A Broader View of Health. People also talked about how successful narrative change can broaden the way policymakers, as well as the general public, think about health and what it



will take to improve health outcomes. There was widespread agreement that discussions about health in California have changed, and that TCE deserved a very large part of the credit for effecting this change. These comments capture people’s perceptions of this shift:

- “ I learned what health really meant. I honestly thought it was just being able to go to the doctor. When BHC came, many of the residents were like, “Oh, having access to the doctor.” But it was much more than that, like having access to a grocery store, having access to healthy food, and having access to a park where you can all be safe. That’s something that was not really considered health to us before.” **(Youth Leader)**
- “ Health is anti-displacement work, health is housing justice, health is economic justice, and health is environmental justice. That’s one of the narrative shifts that you can hear when you talk to residents that have been connected with BHC. They understand now that health is much broader than the doctor’s visit.” **(Community Partner)**
- “ We had a few transportation planners say a couple of times, “This has nothing to do with health. We’re a transportation agency, that’s all we do. We provide transit and we figure out how to maintain our roads and highways and that’s it. Why are you making this conversation bigger than it needs to be?”

IV. Narrative Change

Now, they're about to update these plans and they are incorporating health metrics into their plans." (State Advocate)

3. Changing Hearts and Minds. Respondents applauded TCE for working to instill in people not just a new conceptual understanding of health, but one that actually changes attitudes and beliefs – and thus actions. They recognized that the goal of narrative change is to help shift the way people think and behave, and from there to build public and political will for better practice, systems and policy – not just to have people remember a catchy phrase or campaign slogan. Respondents frequently expressed their admiration for TCE's communications and messaging efforts geared to narrative change. When asked for an illustration, people mentioned the school-to-prison pipeline work as the foremost example of a successful campaign aimed at changing people's hearts and minds, but others examples were mentioned as well:

"What we are trying to change is the community's way of thinking, especially in regards to health issues. We are trying to start a new movement that doesn't only depend on funds, but also the way that people think and their habits." (Resident Leader)

"An opportunity TCE brought forth was providing the campaign communications support for engaging with [school] board members to get more attention to the whole idea of Every Student Matters, to shift the narrative about the bad student versus the good student. They had young people tell their stories about their experience in schools and how their hopes and dreams have been crushed because of what they had experienced in terms of school discipline." (Community Partner)

"We [youth] are doing the "I Am, We Are" project which tries to change the narrative of how one is perceived from either the way they dress, the people they hang out with, the clothes they wear or just by the color of their skin. We're saying just because I dress like this, that's not who I am. I am an artist or I am a person who likes to do photography.

It changes the narrative so now a person can't judge you just by what you do; they can't make a statement that is biased and unjust." (Youth Leader)

"For those of us in the legislature that are fighting these fights, we would say to the board of directors of the Endowment to continue the funding for these marketing campaigns that are working, that are changing the hearts and minds of every Californian, not just those that are already predisposed to support those issues." (State Senator)

B. LESS SUCCESSFUL ASPECTS

Only one group of respondents had negative things to say about BHC's narrative change work: a number of the young people who participated in focus groups. Nearly one-third of these youth (8 out of 22) stated that they felt BHC was imposing its agenda on them, rather than supporting them to come up with their own messages. They wanted to articulate their own narratives about the most pressing needs of their communities, not just be spokespeople for someone else's narrative. Instead of being given agendas and narratives to be championed, young people wanted to define their own narratives and get their own messages out. A few young people went so far as to say that they felt that BHC was censoring their written stories and their verbal communications when they had the opportunity to speak in public forums:

"We talk so much about how the work we do changes the narrative, but if we have someone telling us what the narrative is already, then is it not that much different than working for a multimillion-dollar company that's telling reporters what they need to write about. Ultimately, it's just under the name "non-profit," but it's not that much different than the mainstream media is. We're still being told what to write, and obviously, there are things that are hard to write about, and these youth should have guidance, but you can't claim that it is a space that it isn't. We don't want to just write feel-good stories about the things that go on in our communities." (Youth Leader)

IV. Narrative Change

“Sometimes, I feel like we’re censored in what youth can and cannot write, and that should not be the way that we do things. When I tell my own people, “No, you can’t write that because then we’re going to be upsetting people,” that’s us being hypocrites because this is a space for youth to write about the

reality of a community. And if this is the reality, it’s something that has to be said, and not just covered up because we don’t want the image of BHC to look bad. A lot of young people put a lot of work into BHC, and their voices need to be heard.” **(Youth Leader)**

C. RECOMMENDATIONS FOR CHANGE

Recommendations for Narrative Change in the Next Four Years

Most respondents were extremely positive about this aspect of BHC, hoping TCE would continue to advance narrative change on important health equity issues locally and statewide. The only negative comments came from youth who hope that BHC will not censor their words and will trust them more to articulate their own narratives about their lives and that of others in their community.

One young person hoped that BHC would provide the space and support for youth to ask public officials hard questions and not back away from the tension that might result:

“The school board forum was upsetting because we didn’t get to talk to the candidates. Instead, we heard: “Oh, it’s because BHC doesn’t want to step on their toes because there’s already this tension,” and they don’t want the school board to think that BHC is creating even more tension. If BHC is providing that space, they should be all for it, not halfways. It’s OK if they feel uncomfortable. How do we create change if we can’t work through the tension?” **(Youth Leader)**

V. Leveraging Resources

Throughout the interviews, people commended the foundation for putting such a large investment into some of the poorest communities of the State for an extended period of time. Many respondents also talked about the positive benefits of new and expanded resources that had come into communities because of BHC.

Along with this praise of BHC's efforts came comments by respondents who felt that BHC had not done enough to leverage resources from other foundations. We discuss both the praise and the criticism in this section.

A. ACCOMPLISHMENTS

In discussing BHC's successes in leveraging resources, people talked about the many ways in which they were pursuing additional resources to bolster their work and advance health equity.

Some of the examples offered by interviewees resulted from policy changes discussed in previous sections. Other examples describe how TCE's investment in BHC helped health equity, in general, gain increased attention from funders, particularly public funders. Together, interviewees provided examples of how BHC has, directly or indirectly, helped secure additional resources by attracting additional funding, repurposing existing funding to better meet the needs of low-income communities, and shifting resources to developing communities by accessing previously untapped funding sources.

1. Attracting Additional Funding. Several individuals described how BHC provided the seed money that helped secure or encourage additional investments in advancing health equity for low-income communities and people of color. Some of these individuals spoke fervently of the value of having a large, relatively long-term investment that other funders could supplement. Other people offered specific examples of both direct and indirect ways in which TCE's investments encouraged other funders to allocate resources related to health equity:

“The passage of The School Climate Bill of Rights in May of 2013 created so many

opportunities to advance the work. That's why now we can get \$10 million for restorative justice, because the district [LA Unified] is committed to the program.” (Community Partner)

“We also won a policy that secured more dollars for the construction of wellness centers in high-needs schools. We've secured one for Mendez High School, and we also secured one – out of a different pot of money – for Roosevelt School, a 5,000 square foot wellness center that will be accessible to students and families in the community.” (Community Partner)

“UHC came to terms in a way that they didn't want to. They were able to go from offering us \$2 million in [community] benefits to the final package being more like \$46 million, and (it) benefits the local community around housing and jobs and training. A lot of that was manifested because of the communication support that we got from South LA BHC, in terms of how to access media, how to frame messaging, how to follow up with having these relationships.” (Community Partner)

“The work that we did brought about an additional six million dollars in funding to My Health LA. The funding by the Board of Supervisors went from fifty-five million to sixty-one million, so that was an increase of six million into the program. That came directly from the organizing that One LA,

A. Leveraging Resources: Accomplishments (cited by 25 people)

1. Attracting Additional Funding
2. Repurposing Existing Funding
3. Shifting Resources to Developing Communities

V. Leveraging Resources



an organizing arm funded by the California Endowment, packed the Board of Supervisors with over a thousand people. I mean, that's never seen, or seldom seen in LA County.”
(Community Partner)

“Some of the mainstream education foundations – two, actually – are now supporting student and parent organizing, which just never would have been on their docket before.” **(State Advocate)**

2. Repurposing Existing Funding in the Community. Interviewees gave numerous examples of how existing resources in a given community or county, or at the state level, were either repurposed or better targeted to meet the needs of disadvantaged communities. Examples of such resource allocation decisions include realignment money shifting from sheriffs to housing, jobs and mental health; community benefit agreements, wellness centers in schools, and more money for restorative justice supports in schools. The \$140 million gained for health care for undocumented children was mentioned as

well as much more from the state and counties for undocumented adults:

“So because we’ve invested so heavily in criminalization and incarceration in communities, we haven’t been able to use public resources to support health and human development. The most significant thing that this initiative has done is it helped support communities in beginning the overall reversal of that trend to divest from public investments that compromise community health and well-being, and then reinvest those funds in social supports and community capacity to generate health and well-being.” **(Evaluator)**

“We’ve gotten Alameda County to support paying for 1,400 jobs for the formerly incarcerated. It’s called Jobs for Freedom. Half of that money that the county gets from realignment would go to community organizations for housing, jobs, mental health counseling, direct services for the formerly incarcerated. Most of it was, at first, going to the sheriff and the jails, and the district

V. Leveraging Resources

attorney. So now that's turned around, but they still have yet to release this money. We do have on record that they have agreed to this." **(Community Partner)**

“ One thing we were able to do is that one of our local hospitals had petitioned the district attorney to reduce their charity care by half, because they were saying, now that there's the Affordable Care Act, nobody is coming to our emergency rooms and needing this charity care so we can't spend this much money. In other cities, hospitals have built parks with the money. They have provided education classes on diabetes and high blood pressure, things like preventative care. And so our question to them was, well, if you are having trouble getting rid of your funds, why not invest them in preventive care? The district attorney and general attorney decided not to allow them to reduce their charity care and gave them a deadline to put a new plan together for how they were going to expense these funds.” **(Community Partner)**

“ Another big item that the current high school district had, they had almost \$2 million for a home study program that only had 62 students in it, and they had to take that out of the budget, but that was because of the parent involvement.” **(Resident Leader)**

3. Shifting Resources to Developing Communities.

Some interviewees mentioned victories in which BHC communities became the beneficiaries of new and specific revenue streams. Many of these examples centered on access to infrastructure funding available through environmental programs. One person described how community partners were able to temporarily save a medical services program by obtaining forgiveness of a state loan for infrastructure and a commitment to repurpose the funds:

“ The biggest thing that's changed in a lot of these regional transportation plans is that tremendous growth in biped funding. It became this real sweet spot where groups were pushing for climate protection and regions had to come up with ways to say they were going to get a reduction in vehicle travel. At the same time, one of the big health

equity lenses became for biking and walking infrastructure everywhere, but especially in disadvantaged communities. Some of the groups that I know were funded from TCE had a very active role in helping to frame that issue and it's going to result in a few billion dollars of additional biped funding in Southern California. That was a major victory.” **(State Advocate)**

“ A success for us was working together with groups that were more plugged in to some of the statewide funding opportunities that were available through the Greenhouse Gas Reduction Fund, and other funding pots. A few groups from the Environmental Action Team and community residents collaborated to get the county to apply for a \$1.4 million grant to look at infrastructure, like sidewalk and curb construction in Lamont, which is one of the South Kern's BHC sites. That ability to come together, work with the county, work with the community to bring resources into a neighborhood to address a need that the community had identified, that was a pretty good accomplishment.” **(Community Partner)**

“ What happened is that here in Fresno, the board of supervisors had decided they were going to vote to do away with Medically Indigent Services Program (MISP), which is a medical services program for undocumented and for homeless, anybody who didn't have insurance. Our county needed to pay back \$5.5 million that the state had lent us for transportation. And we were able to work with our assembly member who was able to advocate for our community at the state capitol and have the state forgive us that loan, as long as Fresno city promised that in turn, they would use that \$5.5 million to continue MISP. Even though the board of supervisors was saying there was no money, now we gave them a solution. So for now, the program is safe.” **(Community Partner)**

B. LESS SUCCESSFUL ELEMENTS

The major fault attributed to BHC and specifically to TCE here was a failure to attract many additional foundation

V. Leveraging Resources

partners to invest in or with BHC, as well as a shortfall in coordinating the investments in BHC with other assets – thus achieving the goal of “leveraging.” Fifteen people, spread across community leaders, state advocates and funders, thought that BHC had not connected sufficiently with other resources in the 14 communities, including existing initiatives that had local energy and momentum, or by engaging other funders, so that the resource base for BHC activities could be broader.

1. Engaging Other Funders. Seven respondents noted that they wished that TCE had brought in other funders to help support the work from the beginning of BHC. They thought the tendency to “fly solo” was harmful, especially in this time-limited, place-based initiative. They recognized that this is a frequent challenge for philanthropy: how does a funder best invest large amounts into deeply underinvested neighborhoods and expect long-term transformation, given that foundation support is temporary? Does this do a disservice to the neighborhoods? And, if other funders aren’t engaged from the beginning, what is the likelihood that they will become investment partners later in the initiative? While no one offered solutions to this problem, a few people articulated it and said they thought that at least it would be mitigated somewhat if TCE had reached out to more philanthropic partners who might stagger the timing of their support. These comments came disproportionately from community partners (67% vs. an expected 42%). Sample comments include:

“When we first started off, there was talk about what are the unintended consequences of funding deeply and for a longer amount of time in these communities that have been heavily disinvested. More thought should have been given to this.” **(Community Partner)**

“There was this expectation that other funders would come in aligned with BHC, either because of the momentum created by that large investment or because TCE would go out and help make it happen. But it never did. Funders said, well, okay, TCE has it covered and so we’ll go look somewhere else.” **(Community Partner)**

“TCE has been pretty awkward about partnership, particularly the notion of shared

B. Leveraging Resources: Less Successful Elements (cited by 15 people)

1. Engaging Other Funders (7 people)
2. Coordinating Existing Assets in the Community (12 people)

*ownership of this work. They knew it would be ill advised to wait until year seven or eight and say to other funders: “Why don’t you come in and pick up what we’ve done?” It would have been much better to think early on: “Who else is a funder in this area? Who else cares about these communities?” They should have brought them to the table early on, get their insights, figure out how to work together.” **(Thought Partner)***

“It’s verging on irresponsible to build these groups up like this and to pull the plug with not one other funder in sight.” **(Funder)**

2. Coordinating Existing Assets in the Communities. In a related vein, twelve people said they wished that TCE had built more on community assets and better coordinated existing resources in the BHC communities. These people thought that BHC had come to communities with an agenda, but without sufficiently recognizing and utilizing existing assets in and near the BHC sites. They referred to physical, monetary and people assets, particularly existing collaboratives and leaders working on similar issues. By not capitalizing on leaders and collaboratives already in place, BHC too often had to start its coalition-building from scratch, making the first few years less productive than community leaders and the foundation had hoped. This viewpoint comes disproportionately from Southern California sites (100% compared to an expected 50%), possibly because the greater Los Angeles area already had so many things going on prior to BHC:

“One of the things that I think was a mistake is that when the Endowment initially came in with BHC, they said, “Okay, we’re going

V. Leveraging Resources

to set up a collaborative now.” And that was a condition of funding. But since we’re a relatively small community, it ended up doing away with a good collaborative that already existed, the Coachella Valley Social Justice Collaborative.” **(Resident)**

“ We have a robust health coalition in our county. The part that’s outside BHC is going gangbusters because we don’t have as many restrictions. TCE is missing what’s making the difference and they’re focusing totally in the wrong place, but that’s why I love TCE because they think they’re doing the right thing, but they don’t always listen. They just want to know what we are doing in the BHC neighborhood which is only part of the story.” **(Community Partner)**

“ There was a real loss in the approach that they (TCE) took; they could have gotten to where they are now more readily had they maximized the assets that they had on the ground. The downfall of their approach was that it didn’t

allow them to build upon the successes that were working in the community, and so there was a huge disconnect for groups like ours, where we had been very involved, a lot of investment had come to us; then it was broke. New people had come in, and these new folks were doing things, repeating processes that we had done several years back.” **(State Advocate)**

“ TCE went in without building on some of the other ingredients that had been critical before it walked in with this initiative. The county government, for example, and cities were facilitating other initiatives, health departments had responsibility for other interactions, but that wasn’t engaged enough because of the emphasis on the new message. So there was a failure to build on previous initiatives and previous types of leadership, or to capture the knowledge base of that leadership.” **(State Advocate)**

C. RECOMMENDATIONS FOR CHANGE

Recommendations for Strengthening Leveraging of Resources in the Next Four Years

Respondents felt that BHC had been extremely effective in bringing new resources into BHC communities as the result of the policy wins and emerging systems changes that are underway. Recommendations to further strengthen leveraging in the future included these:

- Proactively seek co-investment from other foundation partners, so that philanthropic financial commitments are shared more broadly and local leaders have contacts and networks that can help them with financial sustainability.
- In the future, build more effectively on community assets and better coordinate existing resources in BHC communities. By partnering with existing efforts that address similar goals under different auspices, BHC can tap into physical, monetary and people assets to expand the effectiveness of its own efforts.

VI. The Challenges Of Focus, Coherence And Reach

While people appreciated the breadth of BHC, some expressed two types of concern about its scope. First, people wondered whether BHC was sufficiently focused to accomplish enough in specific areas and thus be able to prove impact. Second, they expressed concern that BHC had not yet aligned and connected all its separate components in order to drive toward fundamental positive change.

At the same time, other respondents felt that BHC is missing opportunities to address the social determinants that are most critical to health outcomes for residents of BHC communities. Specifically, they continue to urge that BHC address economic opportunity, affordable housing/gentrification and related neighborhood development issues more directly. In the past, TCE has been clear that BHC as an initiative cannot address these issues systematically across sites, and thus actions on these issues have been locally focused. However, partners continue to raise these as missed opportunities.

These are large design issues for BHC, and here we present respondents' views with the aim of communicating partners' strongly held but often divergent views.

A. A LACK OF FOCUS, WHICH MAY DIFFUSE IMPACT

Some respondents thought that BHC's design, as it had evolved, lacked focus in a way that interfered with deep impact. Fourteen people thought BHC was trying to do too many things at once, risking having its effect diffused. These comments come from both community partners and state advocates, but interestingly, the community partners who offered this opinion come disproportionately from Southern California BHC sites: (86% compared to an expected 50%). Related to this point, several people thought that the broad outcomes sought by BHC, across many domains, were too ambitious for the level of resources invested:

“ They (TCE) didn't focus. One thing I've learned: pick three things and do them. You can't have 100 things. (Community Partner)

“ One thing that I noticed is that sometimes it's just too much – too many priorities. Too much work. Too many issue areas. It's a lot of resources, a lot of organizations and it has statewide reach. Would it make sense for them to hone in on one or two policy priorities as opposed to having dozens?” (State Advocate)

“ One of the biggest challenges built into the design of BHC was its breadth. There were, I don't know, in Santa Ana, they had something like 80 priorities.” (State Advocate)

“ The BHC outcomes are overly ambitious given the amount of investment put in. The downside is that the effort has been diluted given the limited dollars and the breadth of the work and organizations involved. A million dollars a year sounds like a lot of money, but when you have those big outcomes that you're trying to achieve, and the diversity of people and organizations, it gets pretty thin pretty quickly. I think they (TCE) need to narrow the field a bit. Figure out where they want to go deep instead of so broad.” (Funder)

B. ALIGNING BHC'S MULTIPLE COMPONENTS

People characterized BHC as striking in its complexity and in the number of organizations, activities, strategies and aims that are involved in any one

VI. The Challenge of Focus, Coherence and Reach

- A. A Lack of Focus, which may Diffuse Impact *(cited by 14 people)*
- B. Aligning BHC's Multiple Components
- C. Missed Opportunities to Address Critical Social Determinants of Health *(cited by 45 people)*

VI. The Challenges Of Focus, Coherence And Reach

community or statewide. The upside of this ambition was mentioned frequently as part of the initiative's successes, particularly building alliances that had not existed before. Not surprisingly, however, respondents also talked about the downside of complexity: the difficulty of aligning and connecting the component pieces as necessary to build capacity and drive toward narrative, systems, and policy change as effectively as possible. Eighteen people mentioned the need for greater integration in BHC's strategies and at the same time better communication between the foundation and its partners so people understand how the parts relate to each other.

People talked about the need for better connections, noting the silos that still exist across strategy areas and policy issues, across racial groups, across communities and between communities and statewide work. Among these, a number of respondents said they feel out of the loop, not knowing what others are doing, sometimes within their own site as well as across sites. Though some progress has been made on this issue over the last several years, people at the operational level thought it had not been fixed entirely:

“I’m not sure if there’s some line of communication that’s been severed or was never even put in place. While there’s a whole lot of talk about we’re doing this and we’re doing that, even the 10 outcomes, but we want to know exactly what you’re doing, because at times, we’re in here shaking our head, like, what the heck is BHC even doing?” (Resident Leader)

“I’m on the steering committee and I go to all the meetings. But I don’t have a sense of the whole BHC effort in my community. If someone asks me about what (BHC in my site) is doing, I can fake it pretty well. But I couldn’t tell you anything at all about how it’s going, what’s important to them, if there might be any linkages to health care. What’s the connectivity between the different initiatives? So how can TCE help create a better sense of the whole?” (Community Partner)

“It’s as if each of these sites is an island and it’s hard to see them adding up to more than their individual parts. The Program Managers



don’t seem to communicate with each other much less with the other side of the house, HCAL. Sometimes I play this really funny role when folks want to know what’s going on, I’m the one – an outsider – that tells them what somebody else at TCE is doing.” (Funder)

“If you want to get to large scalable change, the connection and coordination among all the BHC sites needs to be much stronger.” (State Advocate)

C. MISSED OPPORTUNITIES TO ADDRESS CRITICAL SOCIAL DETERMINANTS OF HEALTH

In response to a direct question about whether they saw any missed opportunities during the first half of BHC, 45 stakeholders mentioned additional issue areas which they believed needed to be addressed in order to advance healthy equity. Foremost was jobs and economic stability for families, mentioned by 13 people, and second was affordable housing, gentrification and displacement, mentioned by 9 people. These partners expressed a hope that TCE would support these policy and practice areas in the BHC sites and statewide in the future. Other topics mentioned in this same vein are shown in **Figure III**.

VI. The Challenges Of Focus, Coherence And Reach

FIGURE III:. Frequency of Areas Identified as Missed Opportunities (Number of Respondents)

Jobs and Family Economic Stability	13	Access to Health Care	3
Affordable Housing/Gentrification	9	Mental Health	3
Incarceration & Deportation	4	Elders	1
Environment	4	Program-Related Investments	1
Healthier Food & Local Farms	4	Heroin Addiction	1

Respondents' views come through most clearly in their direct remarks:

“At first nobody wanted to talk about economics. The Endowment was completely against it. I was on a committee of two people in the group on economic development and nobody wanted to focus on that because the Endowment kept saying that They're supposed to just focus on health and prevention. We keep arguing that they're interconnected and that you can't address one without addressing the other.”
(Community Partner)

“BHC was not equipped in its social determinants of health framework to deal with displacement. It was all poverty, abject poverty, multigenerational poverty, and they didn't switch gears fast enough when condos started going up everywhere. That's muddied their accomplishments. What does equitable development look like in East Oakland, all the LA sites, Santa Ana, San Diego? So many of their sites have been dealing with rampant gentrification, and they haven't addressed the problem. They could have bought up properties for the community or done some land trust type strategies in the places with high displacement.”
(Funder)

“I think about folks who have been incarcerated, and how it intersects with immigration. For Southeast Asian-American people who came as long term permanent residents, and who have a criminal record, they also have deportation orders to Cambodia, to Laos, to Vietnam even though they have never set foot in these countries, because they were mostly born in refugee camps or came as really young children. Now with this new presidential administration, the attack against immigrant communities and communities of color is going to be a really big challenge that we're all going to need to be equipped to defend against.”
(State Advocate)

“TCE's appetite for risk was low regarding Program Related Investments as the Endowment had not really done a lot of program related investing. They wanted us to follow our standard lending and underwriting practices, but doing that meant we couldn't identify a lot of eligible organizations that could take on the investment. It was a missed opportunity. And it was a bit disconcerting for me to see that bringing capital into these neighborhoods and building investment readiness was not one of the objectives of the initiative.”
(State Advocate)

VI. The Challenges Of Focus, Coherence And Reach

D. RECOMMENDATIONS FOR CHANGE

Respondents' recommendations on the challenges of focus, coherence and reach are shown in the box below.

Recommendations for Increasing Focus, Coherence and Reach in the Next Four Years

Community partners and state advocates suggested:

- **Focus:** Identify the policy and system changes that are most important to BHC and focus the initiative's efforts as a whole on those.
 - **Coherence and communication:**
 - » More opportunities for dialogue, specifically to create more connections among sites, and to help state and local leaders (including resident leaders) connect all the separate pieces going on under the rubric of BHC.
 - » Communicate foundation ideas, positions and guidance to stakeholders and partners in more coordinated, consistent and thus effective ways.
- “Most of us are just doing a deep dive into one community, but it would be really interesting to see opportunities across policy issues, across ethnic and cultural groups, across regions within the county, across counties. The Endowment

and the Hubs could collectively and individually be a really important holder, convener, supporter of those conversations, and be bolder in that space instead of being so insular.”
(Community Partner)

“Supporting the connections between organizations was weak in the first half. I wish they would have said: “You guys are working on land use policies. Let's have you meet with Organization X, who has also been working on land use stuff with their youth, and why don't you all come up with a joint outcome or objective that can be included in both of your proposals? It was very disjointed. Better connections between organizations would help us be able to use the resources better, have better research and good, strong organizations.” **(Community Partner)**

VII. TCE Leadership, Internal Culture and Operations

It was striking how many people wanted to talk about how TCE could improve its leadership of BHC and also about the foundation's internal culture and operations during the second half of BHC. Seventy-four people (slightly over 40% of total respondents) commented on various aspects of TCE's leadership, culture and operations. The majority of these urged that TCE create more of a culture of learning at the foundation and among the BHC sites and state partners (forty-nine people), and a significant number thought that the foundation needed to be less prescriptive in its working relationships with partners (forty-six people).

Respondents also commented on other aspects of TCE operations that they felt could be productively improved, but in lesser numbers. For example, nineteen people noted that greater attention was needed to the role of Program Managers as the initiative evolves. Finally, twelve people commented that TCE could be a better partner with communities, in their view, saying that more humility was needed in TCE's approach and relationships. These comments are described in more detail below.

A. EXPANDING THE CULTURE OF LEARNING IN BHC AND TCE

1. Build a More Robust Culture of Learning.

Nineteen people in individual interviews and 30 people across several focus groups, comprising community partners, state advocates and funders, expressed a keen interest in seeing BHC be rooted in a more fully developed culture of learning. They talked about multiple modes of learning. For one, they wanted more and better communication from the foundation about what was happening across the multiple parts of BHC and what the foundation was learning. People loved the Power Grid report, but wondered why something similar couldn't have been produced earlier in the initiative. They wanted to know what BHC's interesting failures were and what could be learned from BHC that might help not only site leaders and state partners refine their approaches, but also other communities and organizations trying to reach similar goals:

“ (One of TCE's executives) came to our site in the last couple of years, very inspiring. I asked this leader, “What has The Endowment and the BHC community as a whole learned, and what have been your interesting failures?” He gave a very good answer. But my point is that's the first that anybody from The Endowment talked about what's going on or how it's being received, or what the interesting failures are and what the successes are. I just want to feel like I'm in a community of learning. I don't feel like The Endowment has been that great at this. I'm interested in how things are connected and what the mutual learning is.” (Community Partner)

“ So what's going on with boys and men of color, what's going on with immigration policy, what's going on in X site versus Y site. They (the leaders within the BHC initiative) don't talk to each other and to us in the outer world.” (Funder)

“ If there's is a replicable pathway to success with a place-based philanthropic initiative, then telling that story is important. There's lots of information about failures in place-based initiatives, so if this is successful, philanthropy could really learn useful intel.” (Funder)

VI. TCE Leadership, Internal Culture and Operations

- A. Expanding the Culture of Learning (cited by 49 people)
- B. Foundation Prescriptiveness, Transparency and Accountability (cited by 46 people)
- C. The Role and Resourcing of Program Managers (cited by 19 people)
- D. TCE as a Partner (cited by 12 people)

VII. TCE Leadership, Internal Culture and Operations

“Most important would be making sure that the things we learned get fully shared, so we don’t lose what took years to figure out. We need to translate and transfer this knowledge to new leadership.” **(State Advocate)**

“There’s an inherent contradiction in BHC where the Endowment says it has a learning culture but sometimes it feels like it is just trying to prove that it works.” **(State Advocate)**

“TCE tried to use a program-related investment loan program at the beginning, but then pulled back. We haven’t heard anything about why. One opportunity for learning is, “What did they try that didn’t work and what are the lessons learned from it?” Was it that the borrowers weren’t ready? Given that this was very place-based and the opportunities were all occurring in these neighborhoods, why didn’t it work?” **(Funder)**

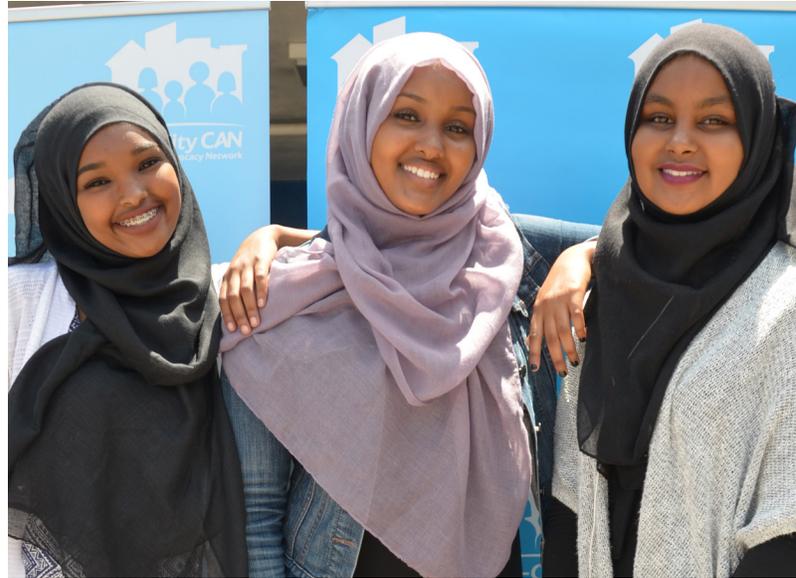
2. Focus Particularly on Cross-Site Learning.

Community partners talked about the need for more cross-site learning, contending that there have been too few opportunities for local partners to come together, share information and learn from each other about what was working well and what was not. State partners echoed this feeling, wanting more opportunity to come together with local sites. Local L&E partners said that they sometimes feel out of the loop and underutilized when it comes to informing TCE about potential enhancements or improvements to how BHC is implemented. And youth leaders echoed the call for more opportunities for cross-site learning and peer sharing as well as follow-up between convenings:

“To really build power, you have to share learnings across localities, across the region, and across the state. BHC hasn’t done that nearly enough.” **(State Advocate)**

“We need more peer sharing. That’s a missed opportunity. I think more peer learning would definitely be helpful from a partner/customer point of view.” **(Community Partner)**

“Where are the learning exchanges [across sites]? Like, what have been your pitfalls, what have been some of your greatest triumphs,



and how did you actually go about doing that?” **(Community Partner)**

“We don’t have enough resources to share with our sisters and brothers. We’re called “sister hubs,” but we’re not doing any of that sisterly love. We want to connect with one another. It’s like with Long Beach, they have all this really cool technology that we don’t have, and it’s only a matter of asking, “Hey, can we collaborate?” We always talk about doing it, but then there’s nobody in between who’s really helping us go on forward. If we’re dwelling on having this backbone stay in place, we really, really need support to push that forward.” **(Youth Leader)**

“For me, it’s all about connection. I feel like we only get to connect with the BHC site people when we’re going someplace else for the weekend that we’re together, and then afterwards, we don’t connect back until the next year when we’re together. It’s like we see each other, and then we don’t see each other for a while. They don’t know what we’re doing on our side, unless we come here to tell them what we’ve been doing, but there’s no checking in. Let’s go back and talk about: “What are you working on now? How are you doing?” There’s no networking back and forth. That could improve.” **(Youth Leader)**

VII. TCE Leadership, Internal Culture and Operations

Recommendations for Building a Stronger Culture of Learning in the Next Four Years

Respondents suggested a variety of ways to promote a more intensive and systematic culture of learning within BHC in the coming years. Recommendations included:

- Quarterly (or regularly scheduled) regional convenings, with intentional opportunities to reflect on lessons, rather than just showcasing what they're doing.
 - Regular opportunities for community and state leaders to interact more frequently, including opportunities for young people to communicate between face-to-face convenings.
 - Produce more frequent reflections on what failed, as well as what worked: exploring what hasn't worked and why, and being clearer about BHC's measures of progress.
- “We need to have maybe quarterly, maybe every three or four months, maybe the Richmond, Oakland, Sacramento sites at least, come down and get together to see what's working.”* **(Resident)**
- “Don't wait another five years to do another Power Grid report. Start some on-going conversations now about what the foundation is learning and invite your partners in and explore what it takes to do this kind of work. It's an attitude as much as anything else. Say “We want to take the time to share stuff publicly, to have more dialogue.” TCE has a story that almost nobody else is able to tell and they have lots of communications saviness, so let's use that to engage others in this story.”* **(Thought Partner)**
- “I'd like to see more regional learning opportunities with several BHC sites together. And TCE should invite state advocates to be in the room to listen – not to talk, but to listen – to what the wins and struggles have been. It would be great if TCE could provide the space where folks can create the dialogue between what you're hearing from the BHC sites and what the statewide opportunities are.”* **(State Advocate)**
- “With grant making, failure is never an option. I can never write a report that we failed. I wish there was more room to probe what didn't work and why.”* **(Community Partner)**
- “I haven't seen any non-process evaluations of BHC. What kinds of measures are they looking for to show success? Identifying real measures would be a huge contribution to the field.”* **(State Advocate)**
- “We'd really like to get together by webinar a couple times a year to highlight what we're each doing so we can beg, borrow and steal good ideas.”* **(Local Evaluators)**

VII. TCE Leadership, Internal Culture and Operations

B. FOUNDATION PRESCRIPTIVENESS, TRANSPARENCY AND ACCOUNTABILITY

Forty-six people said they thought TCE was too prescriptive, saying they would like to see TCE move toward delegating more decision-making responsibility to community partners. They felt strongly that the balance between direction and requirements from the foundation, on the one hand, and local decision-making and ownership, on the other, was not yet right, in several ways.

1. Control and Direction about Initiative Decisions.

Many people suggested that TCE was too controlling of initiative decisions during BHC's first half. One-quarter of the individual interviewees, including community and state leaders as well as funders, urged TCE to listen to and trust grassroots groups more. These respondents felt that TCE's tendency toward prescriptiveness undercut local ownership. One result, they said, was that TCE risked limiting the ability of community and state groups to tackle emerging issues that constantly change.

The areas in which respondents felt TCE's prescriptiveness had been most apparent were in setting priorities for action, making funding decisions that impact local strategies, and in requiring a certain type of collaboration, regardless of coalitions that were already operating (see "Coordinating Existing Assets" on page 48 for a discussion of this last issue):

"If the BHC collaborative or staff are making decisions about who should and shouldn't be part of the initiative, and who are the right people in our organizations to be at the table, it would be really helpful if the Endowment could trust our decision instead of imposing it on us." (Resident Leader)

"That continues to be the challenge of being too directive, too hands-on, and too controlling. Finding the right role between the BHC staff and the grantees, that continues to get mixed reviews from a lot of the grantees. (TCE) staff are too hands-on. But on the flip side, their ear is to the ground so they know what's happening. But listening and hearing things is very different than

trying to control or exert your influence in every decision." (State Advocate)

"You're not listening, TCE. We're a rural community. You said it was about power. Well, we're about the health of a community. I'm concerned about the kid that can't read and the kid that can't eat. And the Endowment won't listen to that. I don't have guns going off over the top of my head at night. I don't have air quality and water quality that's horrible. That's not our set of problems. We have beautiful air, beautiful water, beautiful environment, no overcrowding in schools. But we have huge, high teen pregnancy rates, we have obesity problems, and food scarcity. Those are our problems. There has to be a middle ground between kids starving and obtaining political power in Washington, DC." (Resident Leader)

2. Youth Perspectives About Control and Direction.

Issues of control and direction were particularly sensitive for the young people with whom we spoke. When asked what was least successful about their work with BHC, young people said they felt that BHC had at times been too controlling in the relationships with young people during the past five years, and they wished BHC leaders would trust them more to identify the issues they are most passionate about and give them more discretion to decide how to tackle certain issues:

"Yeah, there are definitely aspects of BHC that have been less successful, and I think that stems from a culture in which there's a top-down model in terms of people who are BHC telling the organizations who are doing work, "We want to see this kind of work happening." Often, the kind of work that they're putting forward that they want organizations to be a part of and do is work that is there for photo ops and not for lasting, meaningful change. For example, in my local BHC site, some of the work that happens is about community-police relations. They pay someone, who is a police officer, to be a police community liaison and attend meetings with young people at our site. So

VII. TCE Leadership, Internal Culture and Operations

whatever they're advocating, whatever they're doing, that policeman is there. I guess I see where they're coming from, but what does that actually signify? These communities hold trauma from interactions with the police, and if they're trying to relieve that by introducing somebody who is a police officer, we need to make sure that this is a person who can interact with young people and that was rarely the case. Sometimes the police officer is trying to recruit people to be police officers, and all of that's happening without any push from BHC or TCE for changes within how policing is happening in those communities. It's like, "We want to regularize relations. We want to make sure that our young people are understanding police," but then there are communities, and this is very true where I live, that are like, "Well, I think it's less important that we understand police, and that police stop killing people, so why don't we do something about that and push forward community control and oversight of police?" Instead of having meetings with the chief of police that won't do anything, why aren't we demanding change from our cities to have those things happen? It's very top-to-bottom, and doesn't seem very much in the spirit of the kind of work that TCE wants to make happen, because all the work that's good that happens, happens because young people say, "This is important and we need to do something about it," and it doesn't happen the other way around." (Youth Leader)

"We had a youth mayoral candidate forum, where the mayor and the future candidates were going to come and talk to our youth. It was a youth event where our youth would be able to ask questions to the mayoral candidates. We told our youth, "Okay, make up a series of questions you can ask," and what was super upsetting was that at the end of the day, those questions were basically thrown out the window because they were screened and censored. The questions that our young people had initiated, they were never asked. It was the questions that BHC wanted us to ask." (Youth Leader)

3. More Input into Grant-Making Decisions. Three community partners and two state advocates who worked closely with sites said that they wished local leaders could have more say in grant-making decisions. They emphasized a point mentioned in other sections of this report: that not being able to have substantial input into grant-making decisions made them feel powerless and sometimes resulted in problematic local dynamics. It is worth noting that the frame of reference for most respondents was "help to decide," not having complete control:

"Not getting to help decide who gets funded presents an added challenge in terms of movement politics. Over the years there have been organizations that we've worked with who stopped getting funded by The Endowment, while some of us continue to be funded. It's not always clear why, but it creates dynamics that complicate the work and creates a problematic dynamic in the community, especially when it's organizations that have been in the community that we have worked with a long time. When a close comrade of many years all of a sudden isn't getting funded and you are, it's a problem for us." (Community Partner)

"It would've been actually a lot better if they (TCE) would've just put the cash in without being so controlling." (State Advocate)

4. Transparency and Accountability in Funding Decisions. Seven people talked about their belief that BHC lacked transparency and accountability around funding. Some felt that funding was not fairly or transparently distributed among sites or with statewide groups. For instance, one person felt that some of the most active and successful sites got the least amount of money. Others wanted to know how TCE made its funding decisions. A few people compared what they saw as their inadequate grant dollars to organizations that were getting much more money and wondered why. Almost all hoped for greater transparency about what the foundation was funding and why:

"We never saw how money was spent; we don't know how it was distributed. Decisions about how grants are made is all top level."

VII. TCE Leadership, Internal Culture and Operations

You have to be recommended to get to the Program Manager.” (Resident Leader)

“In some regions, the investments that are being made aren’t fair. Our site is often described as being one of the most active and successful examples of BHC, but it also receives some of the least amount of funding. It’s not clear how that works. How are the regions or places being evaluated, and how are funding decisions being made?” (Community Partner)

“It would be great if accountability was both ways. Tremendous expectations are placed on grantees; we need to be accountable to each other and responsive to TCE. But there’s more mystery around what TCE is doing. It’s a behemoth institution but it’s not always clear who’s making what decisions and why and who’s going to be around and who’s not. And what their accountability is to the groups they fund. I don’t think it’s trying to be mysterious, but it is sometimes not clear. Things often change, yet it’s not clear why.” (State Advocate)

Recommendations for Increased Partner Input and for Transparency in the Next Four Years

Stakeholders hoped to see several changes in the next four years, including:

- TCE considering how the foundation could involve community and state partners more thoroughly in determining initiative priorities and investments, including greater input of community partners and residents into local funding decisions.
- TCE providing greater transparency, in the form of more communication, about the rationale for funding decisions that affect grantees.

C. THE ROLE AND RESOURCING OF PROGRAM MANAGERS

A number of respondents commented on the important and difficult role of Program Managers, state and local, in BHC. Twelve individual interviewees and 7 state advocate focus group participants mentioned staffing and management issues involving Program Managers that they had observed and thought deserved more attention going forward. They talked in particular about problems stemming from the way the Program Manager role is defined, recognizing that Program Managers are often on the spot to communicate between the many partners implementing BHC activities and TCE, trying to fully represent priorities and perspectives on “both sides.” The people who talked about this topic spanned community partners and state advocates in their expected proportions.

1. Authority of the Program Managers. Some people expressed concern that the role of Program Managers was invested with too much authority by TCE. They recognized that empowering Program Managers and giving them considerable authority to structure local investments in response to local conditions was a deliberate design choice, aimed at customizing strategies to local conditions, resources and priorities. However, some observers felt that this definition of the role had some unintended consequences. One was that it allowed considerable variation in approach and grant-making strategies across sites. Another view, held by nine people, was that this definition of the role lodged too much power in a staff position, without sufficient community input:

“BHC staff members think that they are the leaders and have all the answers. The Program Officer is telling us what to do because they know what everybody is granted to do. So you need to come to me for permission and if I don’t want you to do it, I’m going to create an obstacle. Rather than being a resource -- which they should be.” (Community Partner)

“I have to say I already have a board of directors. You, [Program Manager], are not my board of directors. I am the executive director of my organization. Program Managers are in the room having an influence on decisions

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about tactics and strategy, even staffing.”
(Community Partner)

- “BHC has... too often left up to a program officer from a particular place to structure (the local plan). Depending on different program officer’s expertise and experience, you get different things in different places.” (State Advocate)
- “The sites are pretty different and a lot of that is because of the differences in Program Managers; in some sites they are wonderful, and in some sites you don’t get that... Each PM has different interpretations of the messages. In one site I sometimes work with the Program Manager where they say “Oh, we’re not allowed to do that,” and another site, totally fine.” **(Funder)**

2. Qualifications for Program Managers. Several people suggested that TCE look at the qualifications needed by Program Managers, given the way in which the role has been defined. In particular, people felt that, since BHC increasingly involves mobilizing efforts linked to policy campaigns, it is important for Program Managers to have skills related to that role, i.e., an understanding of or experience in organizing. These people noted that staff selection should be tied to the specific skills that are required to implement BHC’s Theory of Change:

- “Some Program Managers have been hired without any campaign experience. They are making up the rules, because they think they have power over the grantee. If they had experience as an organizer, they would see themselves as, “Oh, I’m supposed to be helping the grantee.” **(Community Partner)**
- “There are parts of BHC that have certainly contributed, but BHC as a strategy hasn’t necessarily changed the state landscape. Yes, there are local victories that are really important, but it’s been really uneven. You can point to specific communities where it’s had a real impact and then in the places where the program officers do not understand organizing, it’s been really painful.” **(State Advocate)**
- “Resources available for Program Managers. Four people expressed concern that Program

Managers were under-resourced, given what a difficult and time consuming job they have:

- “This work is exhausting and they don’t put enough resources into staffing it. I see our Program Manager, she’s so stressed. Our Hub is vastly understaffed. It’s shocking to me. Someone once told me that the Endowment has a philosophy of having all the funding go into the work instead of staff. I’m like, “What? The staff are doing the work, so I don’t get that.” That is such a disservice to the staff who are worked to the bone and burned out, wonderful people doing great stuff. I don’t want them to leave.” **(Community Partner)**

Recommendations for Addressing Staff Roles in the Next Four Years

People suggested ways in which the challenging Program Manager role could be better supported, including:

- Consideration of structured ways to assure more community input into Program Managers funding decisions, with greater communication to partners about the rationale and strategic purpose of those decisions.
- Training or coaching on core skills for the difficult role of the Program Managers, which could also help reduce the variations of approach and experience across sites.
- Consideration of additional resources to support Program Managers.

D. TCE AS A PARTNER

Among the people commenting on TCE’s culture and operations, about a dozen offered their views on how TCE is viewed as a funder and partner and suggested areas where they thought the foundation could be more conscious of its own attitudes and approach to partnering. Seven people, including community partners,

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state advocates and a funder, said they felt that elements of TCE's approach to partnering contributed to problems in execution and results for BHC staff and partners.

Several respondents said they thought **TCE could be more open to new ideas and act with more humility in terms of being willing to learn from partners.**

They thought this was evidenced in part by the fact that TCE did not proactively seek out partnerships with other funders. More frequently, concerns were expressed about the foundation's role and attitudes vis-à-vis community and state partners:

- “There is inevitably this top-down paternal relationship between the funder and the community, especially the grassroots groups that TCE likes to say they are supporting.” **(State Advocate)**
- “They have done a very good job of describing the importance of community partnership, community organizing, and being invested over the long haul. But at times TCE can act like they've figured it all out and we all just need to follow behind them. I just had that experience relatively recently; their communication needs a bit more of the humility that comes from their commitment to continuing to be learners. They sometimes forget that their colleagues may have similar or even different experiences that could also be an opportunity for them to learn.” **(Funder)**
- “The leaders at TCE are very much intellectual leaders, but one of the problems is that they see their roles within and outside of the foundation as teaching others by example: “Here's how you do this stuff,” whether it's taking the theories about the social determinants of health and having that as a framework, or talking about the political knowledge of doing campaigns, whatever it is, they talk more as if they're the experts instead of engaging others in a real back and forth dialogue.” **(Thought Partner)**

Four of the people noted above talked about times when they thought the foundation had **either claimed too much credit for successes that really belonged to others or had not adequately shared this credit**

with the partners who'd been working equally intensely to achieve the result:

- “At times, it seems like TCE is saying: “Oh, tell us about the work that you're doing, so that way we could go back and claim that we had something to do with it.” **(Resident Leader)**
- “Some of us have been working on an upcoming press conference, and now, BHC is coming in saying, “Well, we want to do the press conference. We're going to send out the press release,” and one person who did all the work said, “Who are you and where did you come from?” BHC didn't want to invite the person who did all the work. Now it feels like BHC wants to take the credit. That's one of the negatives about TCE that, sometimes, the Endowment can be overpowering.” **(Community Partner)**
- “How do you attribute a success to TCE when other funders pitch in and invest in the community? Maybe not the exact same grantee, maybe another grantee in the neighborhood. Or maybe the same exact grantee. They have a ways to go on this.” **(Funder)**

Recommendations for Building Additional Partnership Skills in the Next Four Years

State and Community Partners expressed their hope that TCE would continue to take steps to be respectful and humble in the foundation's approach to communities and to build genuine partnerships with community and state level stakeholders. Respondents felt this was important for long term viability and sustainability of this work, as well as to TCE's ability to continue to build capacity of organizations and partners who will sustain this work beyond the foundation's investment.

Conclusion



State advocates, community partners, resident and youth leaders, funders and thought partners talked about a wide range of issues when asked what aspects of BHC were most and least successful during BHC's first five years. They were laudatory in their praise while simultaneously candid and even occasionally tough in their criticisms of what they felt did not go well.

Judging solely by the numbers of people who mentioned a particular topic, this study shows that people gave TCE the highest marks for BHC's successes in the areas of policy change, People Power and narrative change. Of their critiques, people mentioned most frequently their disappointment that BHC had not fully cultivated a robust culture of learning within BHC, that there had been insufficient support of resident leaders and that TCE continued to be prescriptive in areas where it was important to share decisions with partners and thus continue to instill a sense of broad ownership of BHC.

The possibility of combining all the community, regional and state-level "People Power," advocacy and narrative change efforts on behalf of more rapid and effective policy change – and thus on behalf of better health outcomes and health equity – is a vision that many BHC stakeholders recognize and support. Those involved in successful campaigns or other policy initiatives see the possibilities this holds for a new type of mobilization across California.

In sum, the people we spoke with offered continued commitment to, and concrete suggestions for, the work of BHC over the next four years in order to make even greater progress toward the goal of health equity.

Appendix: Methodology

OUR APPROACH

The Community/Stakeholder Engagement (C/SE) process of Building Healthy Communities (BHC) was organized as a series of six tasks: review of prior reports; agreement on the learning questions around which feedback would be solicited; a staff-driven nomination process for selecting stakeholders to be interviewed; conducting interviews and focus groups; data analysis; and interim and final reporting. This appendix details our approach at each stage of the process.

REVIEW OF PRIOR REPORTS

To ensure that this process built on prior efforts, CSSP collected and reviewed 22 prior reports which provided field or stakeholder perspectives about BHC, including research and evaluation reports prepared by consultant firms (e.g., the report prepared in 2014 by FSG), cross-site evaluation reports, site-based mid-point reflections and the survey of participants attending the 2016 convening.³ CSSP looked specifically at feedback on BHC's major accomplishments as well as critiques about what aspects of BHC could have been done better. The CSSP team synthesized this information into a report and used it to help develop the questions and protocols for interviews and focus groups.

DEVELOPING STRATEGIC QUESTIONS AND AREAS OF INQUIRY

The Integrated Team and CSSP developed, and Board members reviewed, five lines of strategic questions that reflected what the foundation most wanted to learn:

- **Impact in the first five years:** What do stakeholders perceive as the most significant accomplishments? What could have been done better?
- **Opportunities looking forward:** What changes can make BHC even more effective in the next five years?

- **Alignment of state-local advocacy, policy/ systems and narrative change:** How have community and state or regional forces worked together to advance health equity? How can this be more effective?
- **Sustaining a movement for health equity:** What alliances, capacities, leadership or other forces should be sustained beyond the period of BHC funding, and how?
- **Innovation and new directions:** What areas of opportunity and possible innovation should TCE consider beyond 2020 in the continued advancement of health equity?

These questions formed the basis for interview protocols and focus group facilitator guides, with small customizations for six different types of respondents: residents, youth, Community Partners, state leaders, funders, and learning and evaluation partners.

IDENTIFYING STAKEHOLDERS

The Integrated Team coordinated a careful nomination process from HCOM, HCAL, Enterprise and L&E teams according to criteria that assured that the eventual interviewees would:

- Be knowledgeable about BHC and its aims and strategies;
- Be honest and candid in their opinions and include people known to be skeptical or critical of certain aspects of BHC;
- Understand BHC's power building goal, including its strategies of mobilization, policy and systems change and narrative change, as well as BHC's aim to leave behind new capacities at the community, regional and state levels;
- Be (or have been) involved in at least one of BHC's campaigns;
- Provide good overall representation across all of the stakeholder list as well as bring some outside perspective to BHC..

³This last survey provided information from 215 state and community partners who attended the 2016 Convening on topics such as their perception of BHC, its most important accomplishments, and whether BHC led to any resource shifts.

Appendix: Methodology

The final list included 62 interviewees and 11 focus groups, including two with state leaders, one with local hub managers, one with local learning and evaluation partners, four with adult residents

and three with youth. **Tables 1 and 2** summarize descriptive characteristics for interviewees and focus group participants.

Table 1: Interviewee Descriptors

	TOTAL	
	N	%
Total # Interviewees	62	100
Stakeholder Type		
Community Partners (includes resident leaders and youth leaders)	26	42
State Leaders	22	35
Funders	9	15
Learning and Evaluation Nominees/Thought Partners	5	8
Level of Work		
Local	22	35
State	15	25
Both	22	35
National	3	5
Grantee Status		
Past Grantee/Current Grantee	48	77
Non-Grantee	14	23

Appendix: Methodology

Table 2: Focus Group Descriptors	
	TOTAL
	N
Total # Focus Group Participants	113
Adult Residents	38
LA County	8
Central Valley	16
City Heights	9
Sacramento	5
Youth Residents	30
State Youth Media Leaders	13
Central Valley	12
Del Norte	5
State Leaders	16
State Advocates	10
Focus Group with TCE Anniversary Convening	6
Local Hub Managers	12
Focus Group with L&E Convening	12
L&E Partners	17
Focus Group with L&E Convening	17

Appendix: Methodology

GATHERING FEEDBACK

Data collection was done by a senior team that is familiar with BHC.⁴ Interviews were conducted by phone, averaged between 60-90 minutes each, and used one of the six protocols developed for each respondent type. Focus groups were led by an in-person facilitator and went into greater depth on the three strategic questions related to (1) major accomplishments, (2) what could be done differently or better in BHC over the next five years, and (3) what additional approaches to achieving health equity TCE should consider.

In combination, the interviews and focus groups resulted in 175 people from BHC's community and state-level activities having shared their views about the initiative with TCE. This includes youth from BHC communities; adult residents from BHC communities; community partners (from non-profit organizations, public agencies such as health departments and schools, organizing partners and local elected officials); state leaders (including state elected officials); and other state and national funders.

REVIEWING DATA

CSSP transcribed all interview and focus group data, entered transcripts into the web-based platform Dedoose, and coded the data using a coding scheme that reflected the strategic questions and areas of inquiry mentioned above. This process sorted the data into six broad clusters: successes; less successful aspects and recommendations for change in the next phase of BHC; state-local alignment; sustainability; new ideas beyond BHC and reflections on the current election; and additional advice. We also organized responses to a subset of questions aimed specifically at learning and evaluation partners and funders into two separate clusters.

When entering transcripts into Dedoose, we used three descriptors to track the following characteristics for all 62 interviewees: stakeholder type (funder/community/state/learning and evaluation partner), level of work (state only/ state and local or local only/national), and grantee status (grantee/non-grantee). We used two additional descriptors to identify interviewees

who operate in a specific geography (urban/rural) and location (north/south). As part of our analysis, we used these five descriptors to look for any notable differences between each subset of interviewees who talked about a specific theme in the report and the full set of interviewees. Focus group respondents were not included in these analyses because we did not have descriptive information on them.

For each cluster, we drafted preliminary memos exploring emerging themes and sub-themes. At the beginning of the process, we paid close attention to areas of consensus, flagging ideas that were repeated across a number of interviews or focus groups and, in some cases, noting approximate frequencies. In subsequent rounds of analysis, we incorporated points of view that were less common but particularly nuanced or actionable. Due to the small number of respondents in each BHC site, we focused our analysis at the initiative level, using site-specific comments or examples to illustrate larger cross-site trends. In the later stages of analysis, we reviewed comments by respondent type to determine whether there were any "missing" voices or notable differences in perspective.

REPORTING

We used the updated analytical memos described above as the basis for reporting, reorganizing the original clusters to better integrate stakeholder feedback and reduce duplication across sections. This approach resulted in the current version of this report and the accompanying additional stand-alone documents. Given the purpose of this C/SE process, these documents all aim to convey both the content and tone of stakeholders' feedback by presenting it in their own words. For this reason, actual quotations, edited for length and clarity, comprise the bulk of each report and are accompanied by brief narratives to help frame or explain key themes.

⁴CSSP's study team includes Gigi Barsoum, Juan Benitez, Prudence Brown, Chrissie Castro, Julia Coffman, Tom David, Audrey Jordan, Rigo Rodriguez and Carla Taylor in addition to Frank Farrow, Cheryl Rogers and Edith Lopez Estrada.