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# Sustaining Power-Building Momentum: Final Recommendations



by **Audrey Jordan and Shiree Teng**

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The Center for the Study of Social Policy (CSSP) works to achieve a racially, economically, and socially just society in which all children and families thrive. We do this by advocating with and for children, youth, and families marginalized by public policies and institutional practices.

## About TCE

The California Endowment (TCE)'s mission is to expand access to affordable, quality health care for underserved individuals and communities and to promote fundamental improvements in the health status of all Californians.

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# Introduction

Building Healthy Communities (BHC) has been the signature initiative of The California Endowment (TCE) for the past 10 years. It has combined continuous investment in leadership and organizing capacity-building and advocacy campaigns in 14 historically disinvested communities, with related state-level and regional policy campaigns and coalition building. BHC has remained far from static in its emphasis and goals, evolving over time in response to the community priorities and successes of the initiative. As the University of Southern California’s Program for Environmental and Regional Equity (now the USC Equity Research Institute) has noted, “what had been considered a means to change has become the change that BHC seeks to achieve, marking what we call a ‘pivot to power.’”<sup>1</sup> Thus, “power-building”<sup>2</sup> became a core BHC function and outcome—focused on addressing critical equity issues in the 14 communities and across the state.

TCE is transitioning to a new phase of long-term funding to further evolve and extend the impact of successful strategies emerging from BHC. As it does so, it is expecting the power-building momentum achieved to be sustained. For this expectation to be met, it is important to develop a deeper understanding of what is in place and what is needed to continue advancing power-building in each of the BHC communities. To that end, beginning in the fall of 2018, a team from the Center for the Study of Social Policy (CSSP), led by Shiree Teng and Audrey Jordan, began exploring the following questions:

- What has been learned about sustaining and evolving power-building in BHC sites?
  - What are local priorities for continued resident and youth power-building?
  - What are the capacities in place and needed for continued momentum?
  - What are TCE’s roles in helping sites to sustain and/or evolve their work?
- What are the implications of the lessons for continued sustainability and evolution of power-building?

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<sup>1</sup> Ito, J., Pastor, M., Lin, M. & Lopez, M. (March 2018) **A Pivot to Power: Lessons from The California Endowment’s Building Healthy Communities about Place, Health, and Philanthropy**. Program on Environmental and Regional Equity. Available here: [https://dornsife.usc.edu/assets/sites/242/docs/TCE\\_Pivot\\_to\\_Power\\_FULL\\_REPORT\\_FINAL.pdf](https://dornsife.usc.edu/assets/sites/242/docs/TCE_Pivot_to_Power_FULL_REPORT_FINAL.pdf).

<sup>2</sup> For purposes of this study, “power building” or “people power” is defined as “developing young and adult leaders to work intergenerationally to raise up the voice of marginalized communities and promote greater civic activism as essential building blocks for an inclusive, equitably prosperous state.” See The California Endowment’s statement “[Our Vision](#)” for more information.

This report follows two presentations for BHC stakeholders that shared emergent findings from the study. In those sessions, we highlighted BHC accomplishments, missteps, and missed opportunities. As many participants agreed, the themes we heard while conducting this study, and that were shared during those sessions, were not new and still resonated. They had been identified in several reports

“The continuity, focus, resource investment, and evolution of our language, strategies, and drivers of change—even though there has been transformation in our campaign emphasis and areas. That stick to it’ness has allowed for growth and evolution, especially in the lesser resourced places.”

— TCE Program Manager

over the years, most comprehensively in a 2017 CSSP publication, “Voices of Partners: Findings from the Community/Stakeholder Engagement Study.”<sup>3</sup>

We are not repeating the findings from those presentations, except to provide this summary as backdrop for the recommendations we are offering. Over the past 10 years, it is acknowledged by those we interviewed, and in written reports, that TCE’s support of the Affordable Care Act (ACA) outreach and enrollment helped lay important groundwork for community power-building. TCE’s investments continued to provide significant support to nurture and strengthen the roots of power-building in each site. In addition, it contributed to successful statewide strategic communication

campaigns on critical issues such as health care for all, student discipline, and justice reinvestment. As a result, the sites’ capacities and the power-building ecosystems in which they are members, as well as the public narrative that increasingly recognizes equity as an essential factor affecting health, are stronger today than they were a decade ago.<sup>4</sup> However, vigilance is needed to maintain and extend these achievements.

The dialogue with participants during and after the two presentations affirmed that answering the study questions in the context of BHC meant moving away from the traditional concept of initiative “sustainability,” which is often limited to the static maintenance of what was put in place during the funding cycle. The more traditional or orthodox view of sustainability often places the onus on the grantee to maintain what was built, including infrastructure and programming. Instead, we reflected on the necessarily growing nature of power-building and how the momentum generated during BHC can be nurtured with the continued and evolving support of TCE.<sup>5,6</sup>

<sup>3</sup>Farrow, F. & Rogers, C. (2017). **Voices of Partners: Findings from the Community/Stakeholder Engagement Study**, Center for the Study of Social Policy.

<sup>4</sup>See **Building Healthy Communities After Five Years: Reflections from HCal Program Staff** (May 2016). This memo summarizes the reflections of program managers who supported the statewide campaigns and other advocacy and system change efforts in California.

<sup>5</sup>**End Games: The Challenge of Sustainability** (April 2002). The Cornerstone Consulting Group for the Annie E Casey Foundation. The authors note, “As funders increasingly seek to engage economically struggling neighborhoods in initiatives, issues of post-grant sustainability become even more complex and more important.”

<sup>6</sup>In the case of BHC, TCE investments in the 14 communities to advance power-building grew over the course of the initiative. By doing so, it funded activities that are outside the comfort zone of many foundations that might otherwise be sources of support for more traditional service and program initiatives. This makes finding the funds to sustain and continue the momentum sparked by TCE’s investments even more challenging.

While engagement with colleagues in the presentations affirmed some of our initial thinking, it also spurred new and revised thinking in at least one area, which we will further explore later in the report in “Maintaining Momentum from Different Starting Points.” We embarked on this study knowing the 14 communities and BHC efforts were not alike. At the time, however, we envisioned—hypothesized—that they would fall into a clear typology with set characteristics. As we described this typology in the first two presentations, we received helpful questions and comments that prompted us to see the sites along a much more fluid spectrum than a typology would imply. Finally, the recommendations offered in this final summary of our learning are in direct response to a participant’s question in our second public session, which we took to heart, “*What recommendations might we make to inform subsequent TCE grantmaking?*”

It is important to note that our exploration concluded prior to the advent of two disruptive forces unlike anything experienced before by California, or indeed the nation. First, the COVID-19 pandemic was just beginning to grip the country, further revealing the gaping racial, health, and economic disparities in the U.S. Then came the murder of George Floyd by police and the crowds who took

**“Unification across resident constituencies so that residents are not just triangulated through separate organizations they are attached to, and there is agreement on what is meant by equitable policies and practices.”**

**— BHC Hub Manager, offering a vision of the future**

to the streets to protest, demanding meaningful justice reform and racial equity—risking their lives to acknowledge the value of Floyd’s. Both of these forces place the accomplishments of the BHC communities in a new light, reinforcing the urgency to continue to fuel their power-building momentum.

Communities want to hold on to the gains they have made over the last 10 years. They want—and need—to take the work farther and deeper. They want to make their visions reality. They see a place where race and the genocide of Native people

and healing can be talked about openly; where strengthened power-building produces powerful constituencies that hold institutions accountable; and where material conditions for impacted people are substantially improved.

To achieve this vision, the emerging community priorities include:

- TCE transition investments—funding, communication support, collective leadership; development, network-building, and learning and evaluation coordination;
- Doubling down on power-building—youth development and more strategic and greater capacity to exercise power that holds systems accountable;
- Cultivating a services and advocacy connection;
- Economic development;
- Expanding the reach of ecosystem influence; and
- Institutional change.

This brief builds on the previous work by offering recommendations for the strategic investments and actions needed to further the momentum, and honoring the investment of time, money, and hard work of residents and community-based organizational leaders to date.

Instead of a heady, purely analytical document steeped in a dominant-culture paradigm, we offer a heart-mind-spirit integration anchored in love of and for the BHC communities. Our intention is to communicate that BHC communities—residents and organizational leaders and system partners—must be supported via their locally-determined strengths, power, and agency, even if this includes strengths, power, and agency that are perhaps not yet seen fully and completely.<sup>7</sup>

“What better ways can we organize where community members are taken care of first ... meeting their needs like housing, transportation, jobs, economic development opportunities ... when that’s not given and asking people to fight, that’s not our values and jeopardizes our future.”

— BHC Hub Manager



<sup>7</sup> Teng, S. & Nuñez, S. (2019). **Measuring Love in the Journey for Justice: A Brown Paper**. Available here: <https://latinocf.org/wp-content/uploads/2019/07/Shiree-Teng-Measuring-Love.pdf>

# Methodology

In our study design, we readily acknowledged that it was oriented toward participant ownership and that BHC site-level actors are the experts in defining and assessing their sustainability efforts. As part of our plan to provide periodic opportunities for real-time learning among colleagues, as well as validation of the study's findings and usefulness, we provided multiple opportunities for a range of TCE staff to engage with us in group settings, in addition to individual interviews.

Starting in 2018, at the spring TCE Learning & Evaluation (L&E) Convening, and over the course of 2018 and 2019, we facilitated several conversations among site Learning and Evaluation partners (L&Es).<sup>8</sup> These conversations among and with L&E colleagues informed our understanding throughout the study process. In addition, we conducted 31 individual interviews with TCE Program Managers (PMs) and Hub Managers (HMs), or those playing that role. Furthermore, we sought insights from our colleagues in TCE and the CSSP targeted studies team (see Appendix). We also brought our own experiences—past and present—working with other foundations to evaluate large-scale place-based initiatives, as L&E partners at two diverse BHC sites, and as evaluators of TCE's Spread and Scale<sup>9</sup> strategy, where we gained in-depth knowledge of four BHC sites. We are grateful to all who shared their time, wisdom, and learning with us.

In October 2019, midway through the study process, we presented our initial learning at another TCE L&E convening to vet what we were hearing from primarily PMs. We offered the session twice during the convening. However, because we presented in a concurrent sessions format, not all convening participants were able to attend either session. In March 2020, via webinar, we again presented our evolving learning, developed from our observations after interviewing all of the HMs. The webinar had 41 attendees and included three polls which asked attendees to what extent our findings resonated with them with respect to (1) priorities for continued evolution of power-building, (2) contributions to power-building, and (3) constraints to power-building.

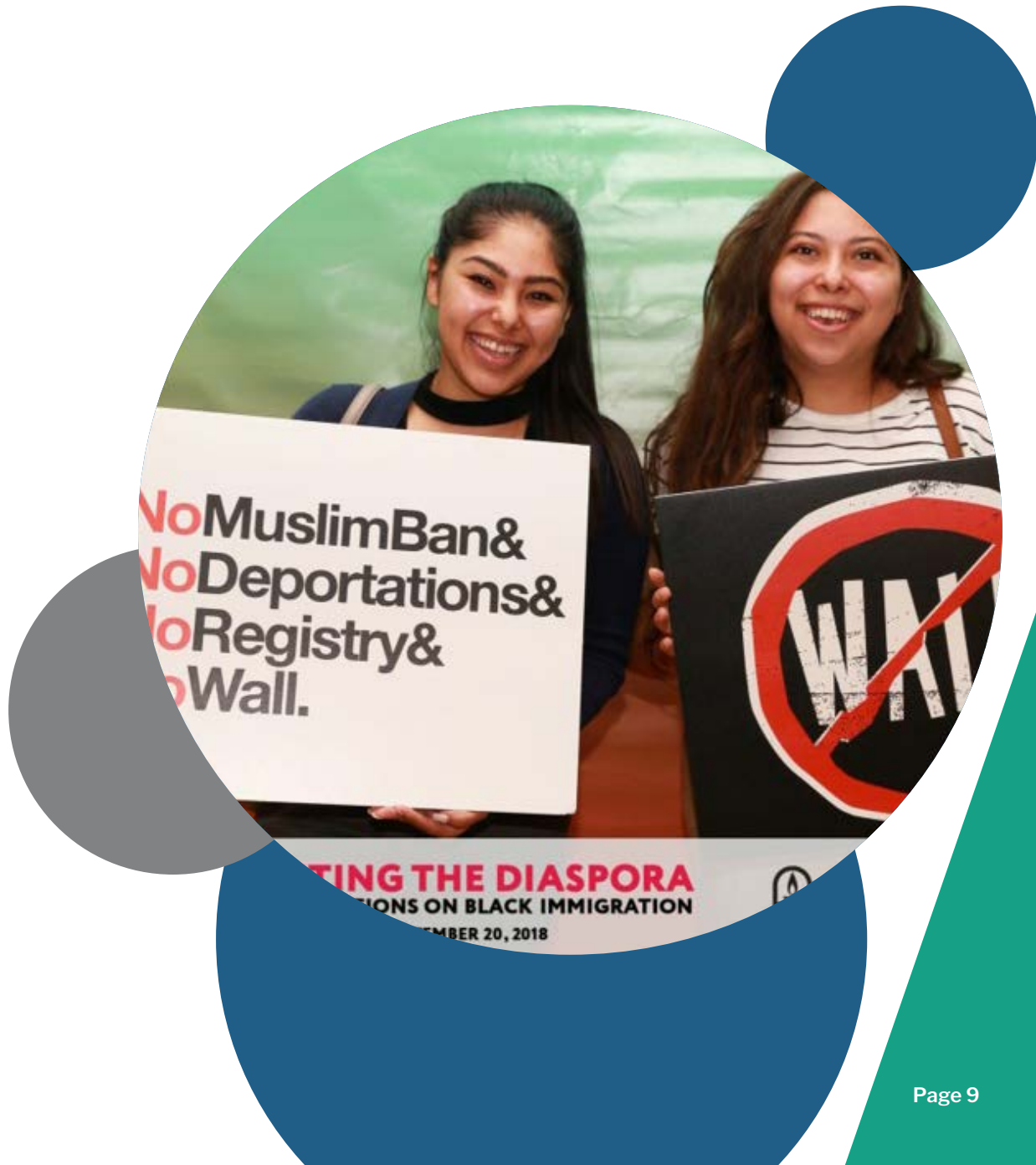
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<sup>8</sup> We want to acknowledge that although engagement with all L&Es was our goal, not all L&E representatives participated. Some L&Es are integral thought partners with the program leaders in the sites, and some are not. Those that are not knew less about many of the specifics of the site work, and some felt they did not have the authority to speak with us about the site work.

<sup>9</sup> Spread and Scale tests the premise that BHC's grassroots organizing, resident power building, policy advocacy, and racial equity agenda can serve as a foundation for broadening the regional ecosystem to achieve long-term structural change. See Jordan, A & Teng, S. (March 2020) **Spread and Scale: Year Three Evaluation Report**. The California Endowment.



We also reviewed internal memos and reports that summarized power-building efforts, BHC Hub evolution, recommendations for sustainability from PMs and Hubs, as well as selected literature from and about other philanthropic initiatives. Finally, in November 2020, we shared our conclusions and recommendations via webinar. We unveiled our evolved thinking about a spectrum of enabling conditions (discussed later in the “Maintaining Momentum from Different Starting Points”) and polled participants about how well this concept resonated with them. Among the 35 who responded, 89 percent thought the concept resonated “extremely or moderately well.” We also gave participants the opportunity to drill down further into the recommendations. Fifty-five attendees initially listened to the presentation and approximately 35 attendees participated in the breakout sessions that discussed the recommendations that resonated the most with them.



# Site Contexts Are Not Equivalent

From the beginning of this study, we were committed to avoiding generalizing lessons across the BHC sites by recognizing and describing the circumstances of each site. However, our experience with BHC and other large-scale, place-based initiatives suggested to us that the sites might fall across a clear typology, based on the resources available to them, the disinvestment they had experienced, their history of successful community organizing, the robustness of partnerships, and their geographic location. As Tom David had written when the 14 sites were selected, *“the political context varied across the sites,”* and in many sites, the *“non-profit infrastructure was historically underfunded, and in many instances, infrastructure for organizing and power-building was virtually non-existent.... In virtually all the sites, there was a historic pattern of little or no philanthropic funding for work specifically focused on power-building. BHC was essentially ‘creating the market’ for this work in most sites...an important consideration as TCE contemplates future funding strategies.”*<sup>10</sup>

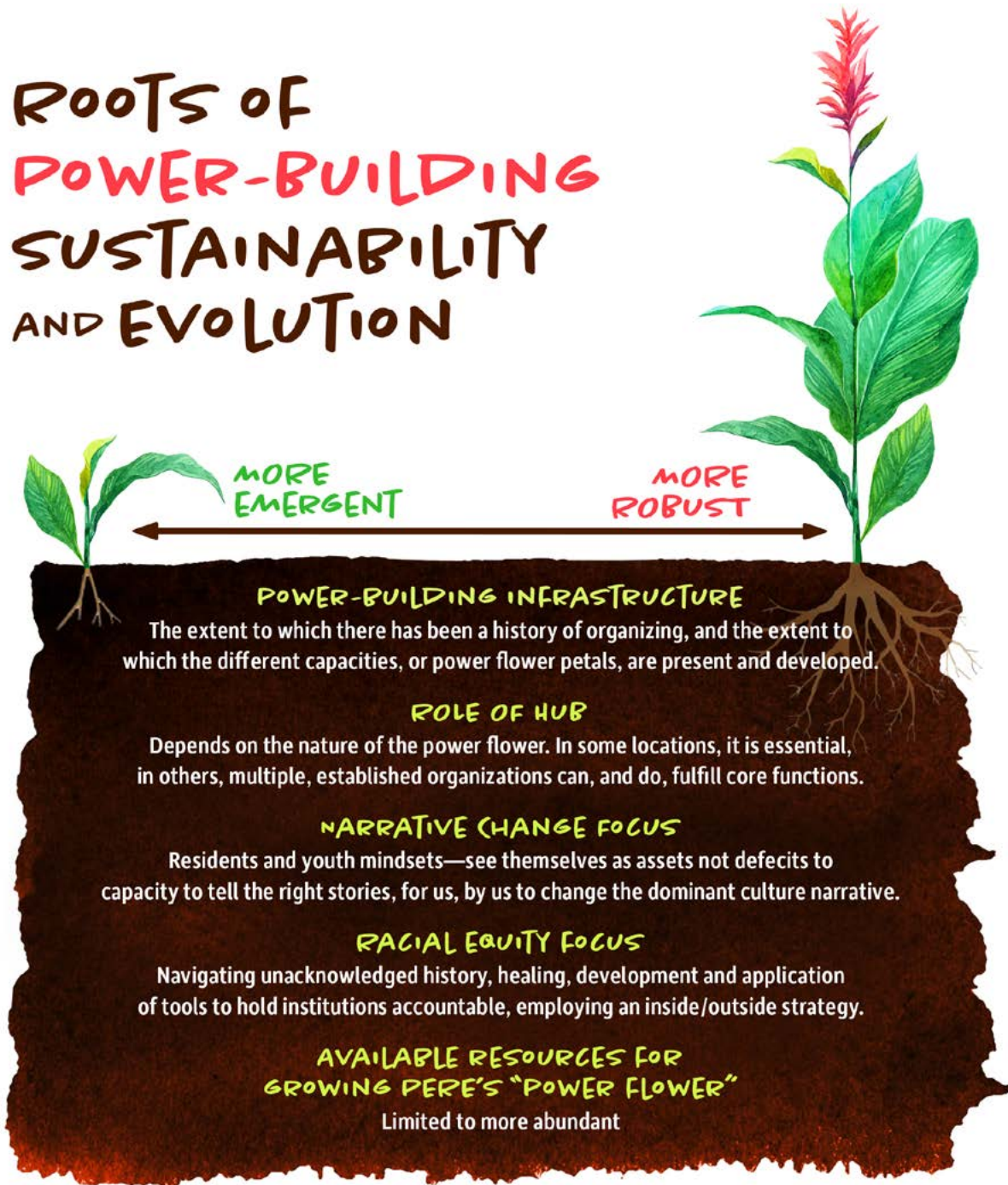
Over time, we recognized that our initial hypothesis about a typology was too rigid. We came to see a “spectrum” as a more helpful way of understanding and appreciating site differences, as few sites could be neatly separated into types based on a host of characteristics. We came to see those characteristics—such as “power-building infrastructure” and “the role of the hub”—as enabling conditions or “roots” that facilitated power-building, with the depth and spread of those roots potentially supporting sustainability and evolution. Site capacity for building, sustaining, and evolving power is influenced by different contexts—in particular, the robustness of the ecosystem. Figure 1 illustrates this spectrum.

<sup>10</sup> David, T. (2019) **Transforming Local Power Building Ecosystem.** The California Endowment.



## Figure 1

The Spectrum of Enabling Conditions (“Roots”) of Power-building Across BHC Sites<sup>11</sup>



<sup>11</sup> The “Power Flower” referenced in the graphic refers to the power ecosystem characteristics defined by Jennifer Ito and her colleagues at USC Equity Research Institute (ERI) in the report, “California Health and Justice for All Power-Building Landscape: Defining the Ecosystem,” October 2019.

The spectrum we surfaced—from *more emergent* to *more robust*—reveals distinct differences in what sites needed at the outset of BHC and still need going forward. Furthermore, a site’s location on the spectrum is not an absolute or fixed vector. Many sites share both emergent and robust conditions, making each one unique and the work of understanding history and context critical to supporting power-building momentum.

Examples of conditions and experiences at the *more emergent* end of the spectrum include:

- **Power-building Infrastructure—Resident leadership capacities, in an organized form, are nascent.** In the absence of an existing organizing infrastructure to galvanize, mobilize, and serve residents in a supportive role, BHC was pivotal in helping to build resident and non-profit organization leadership capacity. More emergent sites have had to build the leadership of residents to address problems through means other than individual-level services and programs. These organizers have deployed popular education models, such as the use of theater of the oppressed (*teatros*) and creation of graphic novels and other visuals, to help connect residents to each other in relatively isolated communities, so that they know that they’re not alone, and that the challenges they face are bigger than anything they can change single-handedly.
- **Role of the Hub—The role of the Hub needed to be built from the ground up and remains critical.** The centralizing function to convene and coordinate the BHC work filled a void in the community. There was no other “container to absorb the backlash or spark momentum.” Hubs remain to serve this vital purpose in several communities.
- **Narrative Change Focus—The first hurdle is changing mindsets.** Narrative change work is primarily focused on creating new mindsets in individuals, that is changing how people see themselves. They are not the individuals they have been told they are. They are moving from a deficit reflection to one that asserts their strengths and recognizes the power they have.
- **Racial Equity Focus—The work begins with making space for conversations.** While leadership in all sites recognize the need to center the work in equity, some sites are still working to make the invisible visible and acknowledge a history of injustices and genocide. As with narrative change, this work is often focused on the individual level through healing that must begin before racial equity can be centered in power-building and community organizing.
- **Available Resources for Growing the “Power Flower”—Resources to support resident organizing and experimentation are extremely limited.** There are very few private funding sources that could replace the investments TCE has made, and, often, too few appropriate organizations (e.g., community-based and/or values-driven) in which to invest in the more emergent sites. For historically under-resourced areas, especially those in Del Norte And Tribal Lands and Central Valley,<sup>12</sup> there is a glaring disparity of philanthropic investments in proportion to the population; in those communities, public sources of funding are largely controlled by forces not aligned with power-building.

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<sup>12</sup> We see some evidence of positive change in the investments from James Irvine Foundation in the Central Valley of recent years.

Examples of conditions and experiences at the *more robust* end of the spectrum include:

- **Power-building Infrastructure—Resident leadership capacities are already located in an existing power ecosystem.** TCE’s funding supporting organizing residents served to complement and extend the work of a well-established power ecosystem with multiple partners.
- **Role of the Hub—Not an essential element to establish or sustain power-building.** Where there is a long history of place-based organizing and advocacy, a centralizing function to convene and coordinate organizing is less critical. While BHC provided a platform for organizations to work together, the BHC Hub “mantle” is more easily assumed by existing, long-established coalitions.
- **Narrative Change Focus—The community is well equipped to tell its own story.** Communication strategies are more developed by the community, and communication vehicles are more accessible to ensure authentic community voices lead the storytelling.
- **Racial Equity Focus—Capacities exist to engage in deeper assessment of root causes in public institutions to spur policy and practice change.** The work has built on and moved beyond individual conversations and recognition of the need to heal. Racial justice frameworks and analysis are more sophisticated, and organizations are partnering with others based on race equity principles and values.
- **Available Resources for Growing the “Power Flower”—Resources to support resident organizing and experimentation are more abundant.** There is greater availability of both private and public funding to invest in and nurture resident and youth leadership in ways that are aligned with the values of the community.



# Maintaining Momentum from Different Starting Points

As TCE and the BHC sites look to the future and think about what it will take to sustain and increase their power-building efforts—to increase the depth and spread of the “roots”—it can be helpful to think about what all sites need as well as what different sites need based upon where, in general, they find themselves on the spectrum. We observed many similarities across the sites in the types of support they need as they sustain the momentum of this moment, but, depending on where a site might be located on the spectrum, there were some unique considerations. We found five areas of needs for sustaining the momentum:

1

**Resources** to build out community organizing, leadership, site-focused learning and documentation, and organizational capacities to cultivate partnership building. While financial support is the life blood to this effort, critical resources also come in the form of knowledge and network connections—all of which a more comprehensive and mature power ecosystem can provide. For sites at different places in their development of their power ecosystem, the need for resources varies:

- **More emergent sites**, having limited local philanthropic resources, need doors to be opened for them to establish their own relationships with high-resource individuals and funders in TCE networks.
- Sites located **mid-spectrum** are looking to better connect service and advocacy organizations in collaboration, and support and encourage direct service groups to deepen their understanding and integration of organizing and advocacy in their ongoing work.

- Those sites toward the **more robust** end of the spectrum are looking for flexible dollars that they can control to sustain their coalition-building efforts and continued development of a network of power-building groups that can come together under BHC or an existing “big tent” effort.

2

**Power to hold institutions accountable** using racial equity principles and practices. This type of power might be exerted in many ways, such as through confronting root causes of systemic oppression with system analysis, increased strategic use of data and communication; streamlining campaigns by understanding root causes and the intersectionality of work—producing fewer but more powerful campaigns, unifying across resident constituencies, and supporting community members as they move into decision-making places and formal positions of power, both elected and appointed.

- The **more emergent** sites may develop and exert this type of power by acquiring and/or developing and applying racial equity tools to help them see the root causes of poverty and oppression and leverage public dollars to sustain policy and systems change.
- Likewise, sites located **mid-spectrum** are looking to heighten collective racial equity, deepen root cause understanding and analysis to build their coalitions, center leadership, and partner with like-minded, values-based networks.

3

**Resident and youth leadership capacity** to do more constituent-led base building and coalition building. BHC has fostered existing capacity and helped to build multi-generational leadership where it was weak or absent. Having a developed “pipeline” of leaders is essential for the work to continue.

- In the **more emergent** sites, this is related to having the resources to invest in strengthening the capacity of residents (especially, but not limited to, youth) to have leadership, voice, and power.

4

**Organizational capacity-building** in sustainability planning and resource development, including capital investment. Greater organizational capacity is essential for assuring a continued presence in the community and to extend the influence by acquiring land and other assets that can be community-owned and under community control. There are clear differences with respect to organizational capacity building needs across the spectrum.

- **More emergent** sites need basics, such as establishment of a central meeting place or hub that can continue to support the site’s convening, capacity-building, and network-building activities. They need computers and internet support. And they need communications support to move from a deficit narrative to an asset narrative, changing how people see themselves and their communities.

- The sites that are situated **mid-spectrum** are more ambitious and need to create 501c3 organizations to serve as lead convener and hub, and often capacity builder. They also want to realize their desire to own land and buildings to combat displacement (gentrification is a real challenge and threat in many BHC communities). Furthermore, they want to strengthen culture-making and narrative change efforts. Finally, they want support for the formation of more 501c4 organizations and activities to realize the “people power” goals in electoral politics.
- Those sites, who are situated on the **more robust** end of the spectrum and have the strongest organizational capacities, are also looking to acquire land and buildings not for themselves, but because ownership and control of land is a key issue for the people being displaced; this problem is especially true in South Los Angeles and East Oakland, California, where there are efforts to preserve historically Black communities. The nature of the communications support they need is for changing the narrative regarding how their communities are seen by dominant culture (“tell the right stories, for us, by us”). Lastly, they seek the capacity to have self-determination in setting their own power-building agenda that is not in competition with TCE, but do need and want TCE’s support to fill in gaps that they self-identify.

## 5

**Agreement to link all TCE investments to the new regional agenda** (even though it may not be called the BHC/TCE agenda). For example, using a strategic agenda as criteria for local sub-grants (as has been done in some of the BHC sites) and ensuring that supplemental TCE investments in local grantees are at least coordinated with the site or regional agenda, which was a challenge in some of the BHC sites.

The current unprecedented health and economic catastrophe emphasizes the imperative for community power that demands a “new normal.” Across the 14 sites, the BHC work has made some things undeniably clear: the collective power of marginalized communities, connected through their common struggle for racial equity, is a force to be reckoned with—and now is their time.



# Recommendations

As we noted earlier, these recommendations are in response to a specific question asked during one of our presentations to BHC stakeholders. We suggest here how TCE, through its grantmaking, could continue to support power-building. In our assessment, TCE should (1) center equity in grantmaking through fully understanding site context (2) invest in site leadership and capacity to center racial equity in local efforts, (3) invest in increased learning and accountability with communities, (4) intensify local leadership pipeline building, (5) invest in the capacity needed for a durable, multi-generational power-building infrastructure, and (6) build out and support core competencies and practices for TCE staff.

1

**Context is everything. Equity demands that TCE move beyond treating all sites as if they were the same. Those places that are in resource-challenged parts of California are very different in terms of resident leadership capacity, organizing infrastructure, and local investment potential.** This translates to differences in plausible strategies, systems inroads, and degree of need for TCE's support, guidance, and direction.

One of our most important reflections is about the determinative effect of context. As noted earlier, our thinking about a typology evolved to the concept of a spectrum, within which a site or region may carry certain characteristics toward one end of the spectrum while holding other characteristics that may fall toward the other end.

Our recommendation is that this spectrum be used in context analysis for adapting TCE's strategies and investments in new geographic configurations going forward. TCE's one-size-fits-all initial approach to funding staff support, Hub structure, and evaluation support in the 14 places was overly stressful at best, and some of the sites required years of damage control to remedy. On its face, this uniform approach may have seemed fair at BHC's inception. Now, 10 years later, we can clearly see that there is an important distinction between equality and equity. Equality means everyone gets the same thing regardless of circumstances; equity means an appreciation for challenges and assets already in place with the desired goal driving investments. Equity considers situational fairness relative to the aim of the initiative.

In short, our recommendation is for **equitable investment and funding**, where historically under-resourced communities need and ought to receive more, not less, funding to

build on what's been established. We need to double down on building momentum in those places. What BHC has helped to build represents a solid beginning of power-building, with capacity, resident organizing, and an organizing infrastructure to sustain this work overtime.

The current pandemic has shown us that the most vulnerable regions must be strengthened if the aspiration is that all of California is an equitable place to live.<sup>13,14,15</sup> This is especially true if sites toward the more emergent end of the spectrum are to take on regional leadership roles. Solving the intractable challenges of health inequity for all of California means resolutely centering the places that have been most neglected. TCE has the opportunity to be a powerful force for systemic change in California by investing in the most emergent sites more deeply and for a longer span of time. This is how equity shows up in grantmaking for comprehensive change.

2

**Sites need intentional leadership and capacity investment to develop and support residents, community partners, and system leaders to center racial equity.** We observed the strategic investment in building racial equity capacity, as exemplified in a few of the sites, by an intentional inside-outside ecosystem strategy.

For any movement that sets its sights on transforming systems, there is a diverse range of perspectives, comfort levels, and distinct but complementary roles. Some partners are well-situated and skilled at building consensus with leaders of system institutions. They are fluent in “system-speak” and more easily assimilate incremental change efforts inside institutions and systems. On the other end of the continuum, there are partners dedicated to the complete and total dismantling of systems in service of more sweeping and fundamental change.<sup>16</sup> Change agents all along the continuum are needed to cultivate transformative, sustainable, structural change. We observed in some of the BHC cross-site gatherings that residents and community-based organizational leaders locate themselves all across this continuum, some explicitly so.

For these inside-outside strategies to work, leaders must execute. Leaders are what make change possible; without them, we have nothing. Furthermore, racial equity is a core organizing vehicle for change, and leaders that embrace racial equity are most powerful when they are supported with training, coaching, tools, a learning community, and reflective practice. Examples of this support include the following:

<sup>13</sup> COVID-19: Seven Things Philanthropy Can Do. FSG. Available here: <https://www.fsg.org/blog/covid-19-seven-things-philanthropy-can-do>.

<sup>14</sup> Philanthropy has a duty to respond quickly to the COVID-19 crisis: here's how we do it. Inside Philanthropy. Available here: <https://www.insidephilanthropy.com/home/2020/3/16/philanthropy-has-a-duty-to-respond-quickly-to-the-covid-19-outbreak-and-heres-how-we-can-do-it>

<sup>15</sup> This is the wake-up call for non-profits and foundations to get political. Vu Le, NonprofitAF. Available here: <https://nonprofitaf.com/2020/04/this-is-the-wake-up-call-for-nonprofits-and-foundations-to-get-political/>

<sup>16</sup> In sociology these types are referred to as functionalism and conflict theory, respectively. See Mooney, L., Knox, D., & Schacht, C. (2007). **The Three Main Sociological Perspectives in Understanding Social Problems**, 5th edition, Wadsworth.

- Relevant and user-friendly tools being developed and used in East Salinas (e.g., [Rosa Gonzalez's](#) Strategic Leadership for Race Equity rubric and the Spectrum of Community Engagement to Management) to help partners become more intentional and strategic, as they work to advance community and systems change work. Other sites are seeing the value in using these same tools.
- In TCE's Spread and Scale efforts, piloted over the last two-and-a-half years, we have seen the resonance and excitement of four cohorts of leaders from Sacramento and San Diego Counties who have gone through Rockwood Leadership Institute's fellowship. Cohort members have mapped the power structures in their respective counties and are excited by the prospects of connecting with members of the other cohorts to engage in expertly facilitated dialogues about race, power, power-building, and self-care. This is a tested model that could further proliferate the leadership pipeline across California.
- Race Forward, with Governing Alliance for Racial Equity (GARE),<sup>17</sup> and capacity building trainings are another highly valued resource that has been in place in East Salinas for eight years and piloted in the Spread and Scale work as well. Race Forward's analysis, tools, and trainings have shown that no matter what door one opens—education, housing, criminal justice, or employment—you solve for the issues families and communities face because they are all connected in these communities' experiences.

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<sup>17</sup>The Salinas case study, **Building the We**, is available here: <https://www.raceforward.org/research/reports/building-we-healing-informed-governing-racial-equity-salinas>.

## Guard against progressive elitism

- Frame “self-care” as being in service to community constituents, not self-centered or overly self-involved; and
- Be willing and able to work through the conflict of power dynamics within the collaborative partnership, cultivating the value of the necessary but different roles of partners.

## Manage gate keeping behaviors and consider the impact of behaviors on residents and practitioners.

- Ask and determine answers to important questions like: *Who decides who gets to be in the room? What is expected as a result?*
- “Hard core” agitators may not be perceived as “belonging” in the room, yet they have much to contribute to move the agenda forward, and the collaborative has more power when it makes space inside a bigger tent.

*“words from the wise”*  
*Spread and Scale Year Three Evaluation Report*

3

**Learning and accountability—structured, supported, reflective practice—provides feedback loops; allows for real-time documentation, rapid prototyping, innovation, and adaptation; and can keep all eyes on TCE’s North Star goals.** This is a capacity that TCE leadership, the TCE Board<sup>18</sup> and the partners in the sites all want and yet still remains elusive. What would it mean to support this work? From the insights of colleagues,<sup>19</sup> our examination of BHC sites, and our own experience, we recommend the following:

- In each site or new regional configuration, **build in time and space for partners to clarify together, as early in the process as possible, what progress looks like, and to agree on what difference the collective work will make.** Then, decide on practical ways—built into the day-to-day work—to be accountable to the systems change and power-building goals that are set for the region. **Learning and evaluation are key ingredients to power-building.** The function gives people the tools, capacities, and knowledge they need to effectively structure and implement strategies.

“Strategy itself [is] informed by strategic analysis, and [is] a precursor to strategic planning and strategic management.”

— Weiss, Coffee, and Bohan-Baker

The main job for a trusted learning partner would be to provide a structure for the strategic conversations to happen and facilitate periodic reflection conversations to monitor progress. L&Es in several sites have served as the informal historians of the work and have been especially helpful when TCE staff and/or Hub staff transition. The learning partner serves as an important data collector and documenter for establishing baseline and then tracking progress as the work is happening. This function, when cultivated and nurtured, can serve as an “accountability mirror” for all partners—including TCE—and is vital to adaptation, course correction, and most of all, learning and making meaning of the work itself as it is happening and in retrospect.

- L&E partners in regional work must **have the authority and support for a more integrated role** in tracking what’s happening with the regions; in defining and summarizing the learning and response to that learning; and in lifting up successes, accomplishments, results, and the stories of the progress in each region, in easily understandable and useable forms.

<sup>18</sup> Brown, P., and David, T. (2020). “**Sustaining Board Engagement: Building Healthy Communities, 2010-2020**,” Washington, DC: Center for the Study of Social Policy.

<sup>19</sup> Weiss, H., Coffman, J., and Bohan-Baker, M. (December 2002). “**Evaluation’s Role in Supporting Initiative Sustainability**,” Harvard Family Research Project, Harvard University, Graduate School of Education.

- Continue to structure the state-wide BHC L&E **learning community** to learn from and help one another, fostering a community of practice with equitable evaluation values and principles. In previous years, this kind of peer-learning was supported, but later ended; it would be valuable for TCE to return to funding this beneficial shared learning and community of practice in a way that explicitly values the L&E partners more. Bolstering this partnership between TCE, the sites, and the L&Es, ideally, would mean improved strategy development, practices, and results for ALL stakeholders, including TCE.
- Use [equitable evaluation principles](#) to identify and support ready and willing L&Es. We offer the following suggestions toward the development of these principles as criteria:
  - **Center the community.** The learning and accountability effort cannot be focused on TCE compliance; there must be clear and useful responsiveness to local partners' evaluation questions and information needs.
  - **Document progress and learnings and then feed this back to the partners.** Mirror in unobtrusive ways and negotiating regular times for group reflection and learning in a consistent rhythm.
  - **Help partners identify results that matter to them.** Use measurement methods and measures that they value (e.g., resident involvement tool, racial equity tool co-designed with residents and partners).
  - **Make sure partners are supported in the least onerous, least burdensome ways.** Show up with respect, not as an expert—i.e., “I’m a strategic partner and not here to judge.” Be rigorous in how to track progress and willing to do the work “in the background.” When information is reflected back, partners see their thoughts and actions in recognizable and digestible forms.
  - **Serve in a liaison, bridge role with TCE’s Learning and Evaluation team,** delivering and finding the most use for any cross-site evaluation to the regions, and doing the legwork to collect and share relevant data. Know how to collect what’s most important in ways that the regions will use for self-evaluation.
  - **Build regions’ capacity for reflection and self-evaluation.** Step in to facilitate when called upon. Be a partner in group facilitation and learning. Build interested others ability to do learning and evaluation and at least be good consumers of data.
  - **Value, center, and be hungry to cultivate a deep understanding of organizing, power, and voice.** Perhaps an area of growth and development for most evaluators, this is an area to demonstrate reciprocity in learning, a place where evaluators are eager to learn from the partners.

Although not all 14 sites have been able to develop the L&E partnership described above, there is already a base of L&E partners in multiple sites to build from, even as the Foundation's investment moves to a more regional focus. From this nucleus, a community of practice across these sites or regions can proliferate through a peer-learning system to reach and engage other interested L&E partners. With TCE support, the group can explore cross-site data and documentation agenda that might include state-wide questions that TCE can bring to co-design with the regions. For example:

- What is working and what isn't in the transition from individual BHC sites to regional power-building?
- To what extent is statewide power-building impact happening? What contributes to it (and how)?
- What is the progress on achieving the TCE North Star goals?

Pursuing such an aligned evaluation agenda would be a win-win for local partners *and* TCE, amplifying the value of a coordinated, comprehensive, and complementary local and state-wide evaluation.

The introduction of COVID-19 into the ecosystem heightens the need for such an approach to learning and evaluation. In a complex, adaptive system, the first learning job is to make order out of chaos, seed and fund experimentation, and apply solutions based on people coming together to solve problems of survival.<sup>20</sup> The work then turns to capturing the learning and disseminating it into the ecosystem as quickly as possible so others can learn and adapt. Then, we can search for patterns and start to name what works under what conditions.

Regarding investment in learning and accountability as a necessary ingredient to evolving power-building in TCE's future work, it is important to avoid the oft-seen inequity that occurs when a foundation is selective about its learning, recognizing only what supports a foundation's ideas or fails to recognize historical lessons have been ignored. Such platitudinous learning is not learning at all. We are advocating for an investment in equitable learning that starts with the intention of first fueling reflective practice for the partners on the ground—who need urgently to learn what works and what doesn't and to build upon and with each other's efforts—and then proceeds to learning for the foundation to inform what supports the doers of the work to learn and do better (e.g., convening, capacity-building, knowledge management, and communications supports).

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<sup>20</sup> Auspos, P. & Cabaj, M. (2014). **Complexity and Community Change: Managing Adaptively to Improve Effectiveness.** The Aspen Institute.

4

**Double down on supporting local leadership pipelines that produce greater community representation in elected and appointed positions.** It is increasingly clear that we are far from living in a representative or reflective democracy. Most of those in positions of power—those making decisions about land use, budgets, schools, housing, and economic development of our cities and regions (especially in the most emergent sites)—*do not* represent the interests of the rising majority in those regions. It’s time for a change!

We recommend that TCE pay particular attention to how it might invest resources, within the limits of its philanthropic charter, in supporting and training residents and community leaders to run for office as part of the leadership of local and regional decision-making bodies of all kinds—whether appointed, elected, or at the neighborhood levels. In sites where a robust Integrated Voter Engagement (IVE) effort occurred (e.g., San Diego, Merced), leaders who grew up in the BHC initiative were elected to office through historic levels of voter turnout.

Recruiting and supporting leaders to enter public office is only the beginning. As they gain positions of authority, they will need a structure around them to offer coaching, training, and hold them accountable to the communities from which they come. Power does unpredictable things to even those who have shown themselves to be from and with the community. These new leaders will require an informed and attentive constituency to support them in making positive change.

5

**Create an intentional capacity-building program to foster a robust, durable, and multi-generational power-building infrastructure.** TCE has done this with the youth leadership work, so that there is a proven roadmap that can be followed. For BHC communities and regions cross the site spectrum, building high-performing, durable organizational capacity is a must.

Rather than continuing to use a “drive-by” or “fly-in” model that is dependent on consultants from the San Francisco Bay Area or Los Angeles, invest patient resources to shore up local capacity, in areas such as: context-centered, sustainable financial models; organizational or network identity



and mission/vision clarity as well as alignment; strategic communications to reach non-traditional audiences; effective board and community governance models; and participant-led evaluation and data collection.

There is also untapped potential in investing in the collaboration competency of elders and young people. We observed this first-hand, for example, in Kern, with its deep legacy of Cesar Chavez and Delores Huerta's United Farm Worker movement. There is a palpable hunger there for multi-generational power-building that needs and wants strategic support.

The pandemic has revealed that money and resilience—not just inflows of funding—are the core ingredients that mitigate disaster and crisis. Consider strategic questions such as:

- Who *should* be funding the work—not who *has* or *will*, but who *should*?
- How might we analyze and critique public (e.g., city and county) budgets and offer up concrete and specific equitable budgeting alternatives?
- How might we navigate emergence and manage, navigate, and adapt to rapid change?

6

**Require, instill, and support a set of core competencies and practices for TCE staff that increases power-sharing with community residents.** Just as leadership matters greatly among residents and community partners, leadership matters for TCE staff. Lift up and leverage their strengths. For those that don't come from an organizing background, provide trainings, support them with coaching and mentoring, and acknowledge, honor, and bring to the center those who have proximity, intimate knowledge, and wisdom of the community. The interviews provided the kinds of traits and competencies that made for the most successful partnerships with TCE staff. These can be helpful as TCE decides site support in the next phase of the work. We believe TCE staff working closely with communities are more likely to be successful if they:

- Have proximity with the designated communities, either as someone who grew up in and/or has lived in and is active in the local community. In sites where this is true, we heard of the value of the relationships, trust, and knowledge of the people and history.
- Have a consistent, humble, and respected presence in the designated community. We observed that there has been much transition among PMs and HMs across the BHC sites, which seems to have contributed to confusion and slow progress that in turn got in the way of needed, trusting relationships.



- Have an authentic racial equity analysis and practice and are willing to learn alongside site partners:
  - Admit mistakes and work to make course corrections;
  - Know history, be present, be guided by the site's priorities and fight for them;
  - Work to make funds as flexible as possible and as locally directed as possible;
  - Have the site's back when pushed and pressured by local elected or institutional leaders; and
  - Take risks on organizing the base (e.g., voting and civic engagement) and figure out how to support issues the communities prioritize within the legal constraints of its foundation status.
- Have the ability to translate and seek understanding—not to come to the site and insist on a TCE, top-down agenda, but to ensure TCE needs are met in language that aligns with site needs:
  - Advocate for the site's agenda in the site and inside TCE; and
  - Have a long view of the work to shift power and change systems, always prioritizing local capacity building over the TCE brand.
- Have the know-how and be eager to deploy L&E resources and talents:
  - Know how to step back and lead from behind; and
  - Practice reflection and hunger for learning.

TCE should structure and incentivize formal and informal grantmaking practices that enable its staff to openly engage leadership teams of residents and community partners. Foundation staff should consult and eventually share power with the community residents as equal partners in making grant decisions. We have seen how when grantmaking is opaque, and done completely in isolation from BHC leadership, the work of BHC suffers. The full potential and power of TCE's resources is not maximized when grantmaking is done behind the walls of privilege that separate the Foundation from the communities with which TCE professes to partner.

# Conclusion

Our study of what is needed to sustain the power-building momentum in and across the BHC communities revealed a deep well of assets and strengths to build on and areas for critical further support and investment. All the sites recognize the need to build their own capacity to sustain the power-building momentum that they appreciate TCE has sparked. It has been both exhausting and rewarding work over the past several years, and there is valuable learning from each and every site, which we hope we have lifted up in the voices of those “in the trenches.”



# Appendix

# Interviews and Peer Learning Discussion Participants

## Program Staff

Diane Aranda  
Jenny Chheang  
Sandy Chiang  
Sandra Davis  
Steve Eldred  
Gisele Fong  
Sabina Gonzales-Eraña  
Juliet Flores Johnson  
Margarita Luna  
Brian Mimura  
Annalisa Robles  
Christine Tien  
Lauren Padilla Valverde  
Geneva Wiki  
Jennifer Ybarra

## HUB Staff

Michelle Carrillo  
Roxanne Carrillo-Garza  
Ismael Castro  
Sandra Castro  
Reuban Barreto  
Joel Cazares  
Alejandra Garcia  
Nehanda Imara  
Andrea Manzo  
Silvia Paz  
Sol Rivas  
Diana Ross  
James Suazo  
Sonya Vasquez  
Kim Williams  
Ana Urzua

## TCE Learning & Evaluation

Hanh Cao Yu  
Lori Nascimento  
Mona Jhawar  
Janine Saunders

## Local Learning & Evaluation Partners

Susana Bonis  
Tania Pacheco  
Amanda Conley  
Lisa Elliot  
Rachel Estrella  
Rosa Gonzalez  
Imani Marshall  
Tiffany Wilson  
Brian Hui  
Parichart Sabado  
Connie Stewart  
Jackie Tran

## Key Informants

Gigi Barsoum  
Prue Brown  
Julia Coffman  
Michele Darling  
Tom David  
Frank Farrow

# About the Authors

## Audrey Jordan

Dr. Audrey Jordan is a champion for scholarship and public leadership that is grounded in democratic principles, data-based, equitable solutions to community problems, citizen participation, and cultural competence. She is currently the Jerry D. Campbell Professor of Civic Engagement at Claremont Lincoln University and a consultant and coach, specializing in developmental evaluation; network organizing; place-based, resident-centered community collaboration; and organizational development. She has a background in community-based research, philanthropy, and academia.

## Shiree Teng

Shiree Teng has worked in the social sector for four decades as a social and racial justice champion—as a front line organizer, advocate, executive director, network facilitator, capacity builder, grantmaker, and evaluator and learning partner. She brings to the work a lifelong commitment to social change and a belief in the potential of groups of people coming together to create powerful solutions to entrenched social issues. Today, Shiree leads several developmental evaluation teams on projects, and partners with The California Endowment, Latino Community Foundation, East Bay Community Foundation Black-Led Organizations initiative, and Haas Jr. Fund Flexible Leadership Awards. Shiree also works as a justice and equity coach with the Packard and Hewlett Foundations to strengthen their respective grantmaking capacities.