

ALIGNING IN ACTION:

HEALTHIER TOGETHER

AN INITIATIVE OF PALM HEALTH FOUNDATION

- Lead organization: Healthier Together, Palm Health Foundation
- Lead sector: Philanthropy
- Location: Palm Beach County, Florida
- Year founded: 2013
- Interviews with Patrick McNamara, Palm Health Foundation president and CEO, and Abigail Goodwin, vice president of grants and community investments, Palm Health Foundation

Health is impacted by factors outside of the health care delivery system, including housing, education, poverty, employment, food availability, transportation, and safety. Recognizing that addressing these socioeconomic determinants of health is needed to meaningfully impact health inequities, a national policy shift is taking place.

Government agencies, payers, and providers are all adopting a social determinants perspective. To effectively address these nonclinical needs, partners must work across sectors. Now, the question is how — what are the best practices for effectively aligning systems?

[Aligning Systems for Health: Health Care + Public Health + Social Services](#), sponsored by the Robert Wood Johnson Foundation (RWJF) and managed by the Georgia Health Policy

Center (GHPC), is focused on learning from stakeholders across the nation about effective ways to align these three sectors to better meet people's goals and needs.

Given variance in the local context, there is no single model or formula to align systems. However, Aligning Systems for Health seeks to understand commonalities that drive successful efforts to align sectors. This series examines how communities that describe their work as aligning systems are doing it around four core components of a [Framework for Aligning Sector](#) that RWJF and GHPC are testing: purpose, governance, data, and sustainable financing mechanisms.

[Healthier Together](#) is a resident-led funding approach designed to solve local communities' most complex health issues, neighborhood by neighborhood. Initiating Healthier Together in 2013, Palm Health Foundation committed \$1 million to each of six selected communities to make lasting, sustainable impact around the three priority areas of diabetes prevention and management, behavioral health, and family caregiving.

LOCAL CONTEXT

From its conception, Healthier Together was intended to be a departure from traditional responsive grantmaking by empowering residents to be at the center of systems change.

"Early on, the foundation really relied on trusted nonprofit partners — those that were previously funded or looked to in terms of thought leadership in the field — to invite others to the table," recalls Abigail Goodwin, vice president of grants and community investments at Palm Health Foundation. "It was through existing relationships with the nonprofit community that we could extend an invitation to more formally engage the folks that they were serving, and to create this effort that really honors community voice and then, over time, resources those folks to not only be part of the solution, but also to define the problem."

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Palm Health Foundation had a three-part vision to change long-term health outcomes in Palm Beach County and narrow health disparities among residents; increase capacity among individuals, organizations, and systems to impact lasting and sustainable change; and establish a new type of learning framework to evaluate the overall impact of the Healthier Together initiative.

The selection of the six communities was data-informed to identify concentrated areas throughout the county with low health indicators, gaps in services, and a high prevalence of risk factors amongst the social determinants of health impacting residents' ability to live healthy lives.

PURPOSE

As this was a new type of grantmaking, Palm Health Foundation admits the vision required clarification, as its original theory of action was rooted in clinically based approaches to health. For example, the foundation originally was looking for decreases in diabetes rates over a five-year period; improvement in awareness, access, and support for behavioral health; and increases in awareness of caregiver needs and access to resources. However, it quickly realized the time frame and measures were not aligned with transformative community change efforts.

"Within the foundation we had a real commitment and shared vision to invest in people," says Goodwin. "Ultimately, people make up communities and people make up organizations, so if we are able to support people to do what they can, what they're good at, what they're drawn to, and to do more of it and deepen their skillset and knowledge, their toolbox, and not necessarily to professionalize everyone who comes to this work, we can equip people to navigate through their community challenges. This has been a cornerstone that we have really deepened over time."

In some ways the foundation views itself as a seventh community on this journey and has committed to learning and evolving itself. The most noticeable shift is that the foundation changed its name from Palm Healthcare Foundation to Palm Health Foundation, reflecting the commitment and leverage behind addressing the social determinants of health. Similarly, communities have also shifted to a broader definition of health.

"Any evolution in purpose has been community-directed," says Patrick McNamara, Palm Health Foundation's president and CEO. "We were very pointed early in this initiative. For instance, our objective was to see a reduction in diabetes rates in five years. We very quickly learned that is unrealistic, especially if we're going to be true to the community-led process."

McNamara points to Jupiter, Fla., Healthier Together's first community, where there was community-driven recognition that they wanted to focus on healthy eating and active living as the solution, not only diabetes prevention, but also for a healthier community overall, and that upstream focus was more widely embraced in the community.

"The work really entails democratizing health and moving to change mindsets and unleashing new solutions in the social determinants of health," says McNamara. "We see relationship development and change in mindsets as a really necessary complement to the technocratic problem-solving stuff that is absolutely necessary and will continue to go on. But problem-solving needs to be more adaptive and complemented by using these resident-led efforts in complex systems sort of work. It's a feedback loop that is missing right now in the technocratic problem-solving process."

DATA

The foundation also recognized early on that data collection would require a nontraditional approach that accounted for the complexity and emergent learnings of the endeavor. This approach would permeate both data collection and evaluation methods.

The foundation uses Results-Based Accountability to present data and inform decision-making in ongoing community sensemaking sessions. Yet, given that the community-based approach elevates the voices of those with lived experience, Palm Health Foundation felt that data collection and evaluation, too, should include lived experience. In seeking a solution that incorporated both traditional metrics and community voice, the foundation decided to deepen its own

HEALTHIER TOGETHER COMMUNITIES

- Healthier Delray Beach (2014)
- Healthier Jupiter (2014)
- Healthier Boynton Beach (2015)
- Healthier Neighbors (Riviera Beach/North West Palm Beach; 2016)
- Healthier Glades (2017)
- Healthier Lake Worth (2017)

capacity. They have been working with Cognitive Edge and use SenseMaker software for collecting stories that can be converted into quantifiable data that is heat mapped to identify where public sentiment is moving.

“The theory is that as the world has become increasingly complex, and with our connectivity and accelerating pace of change, especially when we’re talking about social services and human systems, we are almost always starting in the complex adaptive arena,” explains McNamara. “Yet, often we treat these systems as if they’re ordered and simple, and we impose solutions that just don’t fit. To get used to operating in the complex, adaptive domain requires this regular collective sensemaking.”

FINANCING

Palm Health Foundation originally committed to \$200,000 yearly for each community for five years, which includes the support for a full-time project director in each community. Beyond the five-year period, the foundation committed to support of the project director role but would provide additional financial support through responsive grantmaking. The first two communities are now entering year 6, which is a phase with less financial security.

“It has been a pretty powerful thing to watch as all the communities have been identifying their priority areas and constantly assessing where this work could live over time,” says Goodwin. “What would this look like if this rested with community? Where does that go? Who are the champions? So that’s something that is an ongoing process.”

Jupiter, Fla., thought early on about how to get resources into resident hands, and they developed a minigrant program that has been adapted in the other communities. The foundation says these minigrants have served to build trust, community engagement, and local stewardship of shared resources. In Jupiter, individuals and small nonprofits could apply for \$2,500 grants that fund pilot projects that ultimately may pave the way for other funders to contribute. Selection of minigrant recipients involves community input, with more than 400 people participating. Today, all six of the local Healthier Together initiatives provide varying degrees of mentorship, grant-writing workshops, and supportive platforms for networking and collaboration.

“It has also been a big recognition on our part — that idea of financial sustainability was overwhelming and tended to dominate for so many. It is still a lingering issue, but we really wanted folks to consider this idea of sustainable impact versus the financial sustainability,” says McNamara. “We are bringing together our system partners and other funders and helping them to understand the value of this work — not that everybody has to work this way, but to help understand that there’s value in doing this sort of work, where it previously had been that really specific short-term return on investment and hitting targeted outcomes was the only way to work. We were the ones who were willing to push the boundaries and can take more risks, so that they can now see value in doing that.”

A system partner recently made a \$15,000 match to the Healthier Together minigrant program, doubling the amount of money available to invest in resident ideas.

“The level of financial investment is a drop in the bucket for some of the work that’s being accomplished,” says Goodwin. “What we think a lot about is lasting impact with policy change being the ultimate win and how that can be accomplished through community organizing. It looks different in each community, but it does not take a lot of money to be effective.”

GOVERNANCE

Following the foundation’s invitation for participation among community partners and the people they serve, the initial steering committees were largely composed of nonprofit leaders, early community resident adopters, faith-based leaders, and members of active civic groups. Goodwin described the balance as 50% lived leaders and 50% learned experts from organizations. Palm Health Foundation played a backbone role, but the steering committee volunteers were the search committee for the project director and the ones identifying and vetting a fiscal agent.

“Engagement is a process, and we have really come to understand and build comfort around the idea that there is a place and time for folks’ involvement, and if they don’t stay on for the long term, it’s OK, and that the proverbial table is not literally a steering committee table,” says Goodwin. “Over time, it is cultivation of relationships out in community, and that informs the work moving forward.”

In its backbone role, the foundation aided communities in “force field exercises” and collective sensemaking in order to hone community priorities. These exercises varied from highly structured and facilitated to making the time for conversations.

"Through that process, people would continue to deepen their interest and commitment to this work," says Goodwin. "It was a combination of art and science to really carefully assess where the energy was for pathways to form. There was this natural inclination to group by affinity and around these ideas to do further exploration, but over time, and as the first two communities are in year 6 now, we have really come to understand that these governance structures can slow the work and the degree of innovation and adaptability. We are in a period of transition right now, watching communities evolve from that early, early structured governance to a less formal network structure that's more decentralized."

Communities were launched roughly two per year, and McNamara says the learning from each launch provided valuable insights.



"While each community is very different and has different contexts, there were some common elements in the forming and establishing of each, including gaining comfort with the messiness involved with this," McNamara says. "Striking a balance between the structure to set it up, but also going where the energy goes and paying attention to the feedback helped the project directors to use adaptive leadership tools and skills for managing the effort."

ALIGNING IN ACTION

Delray Beach chose behavioral health as their area of focus, but the community said they couldn't get further without having some challenging discussion about race equity and behavioral health.

McNamara credits Delray Beach with leading the way for the foundation's commitment to sharing the Race Equity Institute workshops with more people throughout all of the communities. Delray Beach hosted other community conversations as part of its novel approach to tackling behavioral health, including conversations on mental health in churches, and getting the Delray Beach Police Department to adopt Mental Health First Aid training for all of its officers.

As an outgrowth of such efforts, individuals with lived experience with behavioral health, natural community supports like faith-based organizations and neighborhood groups, service providers, system partners, and elected officials provided input on how to move to create a countywide effort, later dubbed the BeWellPBC initiative.

Like Healthier Together, BeWellPBC supports resident-inspired solutions to address the county's behavioral health needs. With support from Palm Health Foundation, as well as other philanthropies, the county, behavioral health providers, and social service providers, BeWellPBC seeks to align systems, foster a community culture of health through community-identified innovations, and develop a behavioral health workforce pipeline.

ALIGNING DURING COVID-19

The foundation expanded its use of SenseMaker software to engage youth early on in the COVID-19 pandemic to collect stories about how COVID-19 was affecting their lives. The learnings quickly identified the need to create a rapid-response team with volunteers to look at stories and reach out directly to people.

"We needed a mechanism to provide material assistance, because some of the stories were just so dire," recounts McNamara. "It would have been unethical for us to hear it and not do anything, so we created the Neighbors Helping Neighbors Fund and offered a one-to-one match in the community up to \$200,000."

The foundation looked to “nontraditional places of trust” in the community — churches and some community-based nonprofits — to give the money to in tranches, and let them decide, based on the stories they were hearing in their community, who needed the assistance and who give the money to.

McNamara credits the local project directors with “hyperlocal knowledge” with solving “last-mile” problems, like in food distribution.

INSIGHTS FROM THE COLLABORATIVE

Palm Health Foundation recently completed a five-year assessment of its efforts to transform communities through Healthier Together and key learning focused on time, patience, and embracing adaptability.

“What was foundational for all of the communities was taking the time and really being patient to develop trusting relationships,” says McNamara. “There is a difference between folks coming in who are clinicians saying, ‘This is the definition of behavioral health, these are where the gaps are, and this is what we need to do,’ versus asking the community, ‘How do you guys define behavioral health? What is it that you see, and what do you think we can make progress on?’”

“We got very different answers from folks once they saw that it was a level playing field and that their input and suggestions would really be taken to heart and taken into account,” McNamara recounts. “By creating safe space for experimentation to fail, and letting folks put forward some novel ideas, and looking for emerging leaders in the community who had ideas, you can literally invest in residents and their ideas. When you partner with the community and you recognize strengths that are already there and leverage those, you get so much further than you would otherwise.”

INSIGHTS FOR ALIGNING

- Palm Health Foundation has operationalized the incorporation of community voice across multiple components:
 - In listening to the community, purpose was shifted from reducing diabetes to focusing on healthy eating and active living as a means to a healthier community.
 - Collective sensemaking around data was used to elevate the voices of those with lived experience.
 - One grantee involves the community in their decisions related to awarding minigrants to ignite new projects.
 - The projects steering committee is a balance of 50% lived leaders and 50% learned experts from organizations.
- In line with the Framework for Aligning Sectors, the foundation saw the importance of the need to change mindsets in order to achieve broader goals.
- The foundation also recognized the adaptive nature of working across complex systems.

ALIGNING SYSTEMS FOR HEALTH

Health Care + Public Health + Social Services

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