

CASE EXAMPLE: HOW TO CENTER COMMUNITY VOICE IN FUNDING DECISIONS AND PLANNING SOLUTIONS

[Healthier Together](#) is a resident-led funding approach designed to solve local communities' most complex health issues at the neighborhood level. In 2013, Palm Health Foundation committed \$1 million to each of Healthier Together's six selected communities to make lasting impact around the three priority areas of diabetes prevention and management, behavioral health, and family caregiving. The foundation evolved from its initial goal-oriented vision and now embraces a more holistic approach emphasizing systems and culture change that is rooted in shared local leadership and stewardship and grows resident and community capacity for action.

The Georgia Health Policy Center spoke to Abigail Goodwin, executive vice president at Palm Health Foundation.

What was the original vision for how community could lead local Healthier Together efforts?

Healthier Together was intended to be a departure from traditional responsive grantmaking by empowering residents to be at the center of systems change. It came out of the momentum around collective impact and was initially envisioned as a five-year strategy of deeply investing in community in partnership with residents.

Palm Health has always been highly relational in its grant making, meaning a traditional grant included investment beyond the financial capital and always incorporated organizational or leadership capacity building or skills development. Healthier Together was a way to build on that history and partner directly with community.

How did community engagement work? What strategies and tactics were successful?

Palm Health committed \$200,000 yearly for each community for five years, including the support for a full-time project director in each community. After the five-year period, the foundation would continue to support the project director role, but additional financial support would be provided through responsive grantmaking.

Prework and relationship building

The first phase of engagement involved earning the trust of the community and getting the community organized enough and the champions identified and committed enough to participate in hiring the project director, identifying a fiscal agent, and forming the early steering committee.

- *Participatory learning and action:* One participatory learning and action method that the foundation employed was a force field exercise where a group of residents would visualize what life looks like for them and their community now, what they wanted to look like in five or 10 years, and the positive and negative forces preventing them or enabling them to get there — all drawn in pictures.

- *Listening sessions:* Goodwin recalls attending the listening sessions (where the foundation brought food and space for personal storytelling, but little or no agenda). At the sessions the foundation was looking for folks who were really excited about working this way, the naysayers, and the wafflers or undecided individuals, who may be persuadable. Above all she was looking for when the group achieved consistency both in terms of who was showing up and in the topics of conversation. This level of consistency was an indicator the group was ready to put a job description together for the project director.
- *Bearing witness:* Goodwin found it important to invite other decision-makers and those with positional power at the foundation to the listening sessions to bear witness to the process and hear the residents' stories. This included the CEO, other staff, and trustees. These participants were prepped to be authentic, but mindful of how they introduced themselves and what they wore, and to be aware that this was the residents' time and space. (Suggested introductions included. "I am from Palm Beach County. I am a trustee of Palm Health Foundation, and I am here today because...") Having residents and trustees proximate to each other and listening to each other is a powerful experience for both parties.
- *Researching community narratives:* The foundation sought to learn and research community narratives: What do they say about themselves? What are the legacies they hold? What are the outside narratives projected onto the community? This knowledge enabled the foundation to anticipate sensitivities and make often invisible issues visible, ultimately surfacing many powerful, more upstream issues facing a community. These included a segregation wall in Lake Worth Beach, the role of corporate agriculture in the rural Palm Beach County communities, and a Boynton Beach neighborhood's relationship with police department.
- *Hiring the project director:* Residents led the search process for their communities' project director with administrative, logistical, and technical and coaching support from the foundation and other executive level nonprofit leaders serving on the steering committees. The participation of the respective fiscal agents in each community varied. It is important for the project directors to be from the community and with a high degree of personal investment in the community. The foundation provided the tools and resources to continue to build the resident engagement and center the relationships with the newly hired project director.

Minigrants

Jupiter, Fla., launched in 2014 and early on developed a minigrant program to get resources into resident hands. This strategy was adopted and adapted in the other Healthier Together communities. These minigrants effectively built trust, community engagement, and local stewardship of shared resources. In Jupiter, individuals and small nonprofits could apply for \$2,500 grants for pilot projects that in many cases ultimately paved the way for other funders to contribute. Community members voted to select the minigrant recipients, with more than 400 people participating and the top eight of 16 projects receiving funding. All six local Healthier Together communities provide varying mentorship, grant-writing workshops, and supportive platforms for networking and collaboration.

Other ways residents are involved in directing resources

- *Participatory budgeting:* Most Healthier Together communities engage in a highly participatory annual budgeting process, with workgroups or action teams determining what their scope of work may look like for the coming year and assigning dollar values to the activities they hope to engage in. This helps bring considerable ownership for the group's work, accountability for the individuals involved and as a group to the initiative as a whole, and increases skills and knowledge related to the budgeting process.
- *Determines salary and annual increases or bonuses for the project director position.*
- *Monitors the overall budget:* This includes the indirect cost to the fiscal agent, which takes different forms in each community.

Investing in residents

The foundation sent a large number of residents to the Tamarack Institute for Everyday Democracy trainings, but recognizes it is not just about exposing them, but that there is follow-up to support realization of each resident achieving their full potential and interests. The foundation is also mindful about professionalization and that building one's capacity or recognizing skills and talents does not necessarily have to lead to a nonprofit job. The foundation is also building a community consulting line in its operating budget to pay community members for training and facilitating sensemaking sessions.

What are the lessons for local wellness funds, foundations, and others with resources available for communities?

Healthier Together's six-plus years of learning have reinforced how community change is relational and people-centered, and its early impacts reflect this. Goodwin explains that building the capacity of residents has led to tangible results including

changing individual lives (starting their own nonprofits and getting paid for their expertise), creating economic impact with increasing investment in previously under-resourced neighborhoods), and gaining influence with individuals empowered by new relationships running for office and developing relationships with organizations and funders.

Foundations, local wellness funds, government agencies, and other organizations that have resources to direct to communities and residents can substantially increase their own impact by finding ways to build individual capacity and to develop trusted relationships in traditionally under-represented communities.

A few of the ways Healthier Together has shifted the foundation's perspective in many ways, including:

- Shifting the time horizon from a one to three-year grant cycle to long-term investment in people and place. This requires a commitment at the board level.
- Ensuring trust in staff and in the process. Both the board of directors and the foundation's Community Investment Committee were kept up to date with frequent, transparent updates on the complexities of the work, including challenges and unknowns.
- Appreciating staff with nontraditional backgrounds that lend themselves to community engagement work, including applied anthropology and public health, clinical social work, case management, and child welfare. Working non-business hours is essential to enable community members to attend meetings in the evening and on weekends.
- Challenging long-held perspectives on impact. The foundation has shifted from traditional measures (e.g., number of people accessing mental health services) to increasing comfort with measures of communities exerting influence (e.g., policy wins, resident leaders being consulted by the city or advising other funders and organizations).

Engagement is dynamic

Engagement wanes and shifts. Some people are really drawn to the early work, the startup phase, but may not continue to be there later. Others may be uncomfortable with the startup process but would like to be invited later as things are more fully formed. There is a balance to finding the right people at the right time.

Growing the bench

Goodwin acknowledges that transformational change cannot be created by just project directors or a handful of community champions. The bench of participants needs to continue to grow. The minigrants process and active workgroups are effective to engage new, interested residents, which ultimately, the foundation sees as adding sustainability to the Healthier Together initiative and the number of topics engaged upon.

Palm Health Foundation's Theory for Culture Change

Aspiration

We seek a Palm Beach County where all communities are healthy, thriving and equitable.

Goals

In order to achieve this, the aim of Healthier Together is to narrow Palm Beach County's health disparities and grow communities' capacity for action.

How We Work

We shine a light on communities' aspirations for a healthier future and engage residents in a meaningful way while expanding and sharing leadership at a local level. Based on the visions for healthier communities, community participation and shared leadership, Healthier Together communities grow networks in partnership with their residents, organizations and system partners.

The Change We Want To See

The networks define challenges facing communities, and design and implement effective problem-solving approaches to influence programs, policies, resource flows, relationships, power dynamics, and ultimately, the mindsets which hold conditions in place.

Source: Palm Health Foundation. (2020). *A Shared Purpose: Transforming Communities Through the Social Determinants of Health, Lessons learned from the first five years.* https://irp-cdn.multiscreensite.com/29a08d35/files/uploaded/Healthier%20Together%20Pa-per_A%20Shared%20Purpose.pdf