What Does It Take? Reflections on Foundation Practice in Building Healthy Communities, 2010–2020

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Introduction

Building Healthy Communities (BHC) is a 10-year, $1.75 billion program of The California Endowment (TCE) that combined intensive investment in 14 historically disinvested communities with sophisticated state- and regional-level policy campaigns and coalition building to promote health equity. Building on the efforts of a generation of place-based "comprehensive community initiatives," BHC is characterized by a unique blend of "proximal" neighborhood-level engagement and sophisticated media strategies to shift the public narrative toward a deeper understanding of systemic inequities and the potential of people power to transform them.

As the conclusion of its initial investment in BHC approached, TCE commissioned multiple retrospective analyses of this extraordinarily complex undertaking.[1] Farrow, Rogers, and Henderson-Frakes (2020), for example, provide an analysis of how power to advance health and racial equity has been built, exercised, and sustained over BHC's 10 years. THP Impact (2020) includes a dashboard of BHC's accomplishments at the local, regional, and state levels, and describes its evolution from a foundation initiative to a broader orientation toward movement building. David and Brown (2020) examine the practices of TCE itself — the roles it played, the structures it put in place, and the capacities it developed in designing, implementing, and

Key Points

- Foundation practice — how a foundation goes about its work — plays a significant role in determining the results of the work, particularly for foundations that take on roles that position them as part of the action rather than solely as sources of funds.

- This article aims to build upon the lessons from past place-based work by examining the practices of The California Endowment as it designed and implemented Building Healthy Communities, a 10-year initiative to promote health equity. The initiative combined intensive investment in 14 historically disinvested communities with sophisticated state- and regional-level policy campaigns and coalition-building strategies to shift the public narrative toward a deeper understanding of systemic inequities and the potential of people power to transform them.

- More specifically, the article focuses on how the Foundation's board was recruited, managed, nurtured, and leveraged to ensure support for the initiative over 10 years. Long-term community and systems-change work is notoriously challenging for foundation boards. The article suggests seven strategies that appeared key to effective board governance of Building Healthy Communities, and ends with some reflections on what it takes for a private foundation to succeed in such a complex and long-term enterprise.

Reflective Practice

As California's largest private health funder, TCE increasingly faced pressure to demonstrate cumulative results, which drew it — like some other larger foundations around the country at the time — to the idea of increasing impact by concentrating resources in defined geographic areas.

learning from BHC. Additional analyses are in the pipeline.

This article focuses on how the TCE board was recruited, managed, nurtured, and leveraged to ensure support for the initiative over 10 years. Our assumption is that how a foundation goes about its work plays a significant role in determining its outcomes, particularly for foundations that take on roles that position them as part of the action rather than solely as sources of funds (Brown, 2012). Examining the TCE board experience has yielded insights into effective governance of complex, multisite, multiyear initiatives that we hope can be useful to the larger field.

The article is organized into three parts. First is a brief description of BHC's history and the implementation roles the Foundation shaped for itself in order to achieve the initiative's goals. This sets the context for part two, the strategies that respondents identified as key to effective board governance of BHC. The article ends with some broader reflections on what it takes for foundations to do this work well.

To sample the perspectives of multiple BHC participants, we conducted more than 50 phone interviews with current and former TCE board members, executive leadership, and program staff, as well as BHC partners and consultants.

We also reviewed outside evaluations of BHC, board materials from 2002–2020, results from community stakeholder and partner studies, and TCE internal reports.

TCE's Role in Creating and Implementing BHC

Established in 1996 as a health conversion foundation, TCE's mission is to improve health outcomes for all Californians. After five years of grantmaking, it developed a strategic framework that included regionalized responsive grantmaking, several focused initiatives, and some statewide public policy work. As California's largest private health funder, TCE increasingly faced pressure to demonstrate cumulative results, which drew it — like some other larger foundations around the country at the time — to the idea of increasing impact by concentrating resources in defined geographic areas. In 2007 the Foundation's leadership proposed in a memorandum to the board a new strategic direction that would "put a stake in the ground at the nexus of place, prevention, and poverty" and connect "local energy, passion, and creativity with statewide change."

Planning for BHC began with several key assumptions. Conceptually, it would be rooted in a broad definition of health that underscored social determinants, and operationally, would require a commitment of at least a decade. Strategically, BHC would expand traditional place-based philanthropy by combining intensive investment in a limited number of communities with statewide policy and systems-change strategies to achieve health equity at scale.

These bold ambitions required TCE to move beyond a conventional transactional approach to philanthropy to one in which the foundation itself would be part of the action, taking a "changemaking" role in setting the agenda and operating simultaneously at the community and statewide levels (Brown, 2012). Our interviews suggest that the Foundation played six new roles that are particularly useful for understanding BHC's goals, assumptions, and accomplishments. These roles are summarized below because they

Reflective Practice

convey a flavor of BHC's work and set the stage for the governance strategies that are the focus of the next section.[2]

- *Patient Long-Term Investor.* TCE's 10-year commitment of significant funding was probably the most important role played by the Foundation from the viewpoint of grantees and external observers. It acknowledged just how complex the challenge of community transformation would be and allowed BHC partners the continuity to pursue a much longer-term policy agenda and stick with it despite inevitable setbacks.

- *Proximal Ally.* TCE program managers were assigned to the 14 communities, where they spent a good deal of time developing local relationships, fostering collaborative planning and action, and helping turn local ideas into actionable strategies. As they built trust with community activists, the program managers were better able to understand the local landscape, grasp its political dynamics, and support grassroots groups and activities that they would have been hard pressed to identify and appreciate at a distance. Operating "proximally" — or closer to the action than typical — was a different kind of role for a statewide foundation, requiring transparency, political acuity, and a constant balancing between accountability to TCE and accountability to the community.

- *Narrative Driver.* By expanding the boundaries of health philanthropy to encompass the social determinants of health and racial equity, TCE worked to shift the public narrative about what constitutes a healthy community, personified by its widely circulated, branded media messages such as "your ZIP code shouldn't predict how long you'll live, but it does." It continually reframed prevention and health promotion from solely an individual responsibility to identify institutional racism and systemic failings as fundamental barriers to building community health. In addition to broad communications and targeted policy campaigns, TCE commissioned art, videos, social media, advertising, and public events to promote its key messages.

- *Principled Risk Taker.* In its public statements and direct actions, TCE consistently demonstrated its commitment to a set of core values that prioritize principles such as diversity, equity, and inclusion, and health and justice for all. By committing to support community-defined priorities and making deep investments in power-building organizations, it enabled and emboldened local and state-level activists to build their voice and challenge existing power structures. TCE intentionally sought to change the dominant philanthropic narrative about "risk" by reframing these issues and organizations as mainstream public health concerns.

- *Campaign Director.* TCE took the lead in designing and implementing multiple state-level public policy issue campaigns that combined messaging with mobilization around issues such as Affordable Care Act (ACA) implementation, health care for the undocumented, and reform of school discipline policies. Besides contracting with media professionals, TCE staff learned to seek out and listen to the people who are living these issues. They provided new tools, creative designs, technical assistance, and message research to help community-based partners integrate messaging into their voter outreach and health-related campaigns.

- *Strategic Opportunist.* Even with a major investment like BHC, the Foundation retained the budget flexibility to quickly allocate significant additional dollars to pursue timely opportunities that complemented BHC's core purposes, such as California ACA implementation and statewide leadership development for young men of color. The inability to nimbly pursue

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[2] See David and Brown (2020) for a fuller articulation of these roles and their implementation.

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emerging opportunities due to "locked in" multiyear funding commitments has vexed other long-term foundation initiatives. But by having a pool of resources that were left unprogrammed in each annual budget, TCE could play both strategic opportunist and patient investor roles, balancing opportunism with disciplined focus.

The combination of community-level and statewide activity, and the wide range of roles that TCE played over the course of the initiative, is unique among foundations engaged in community and systems-change work. Also distinctive is the significant scale and duration of TCE's investment in 14 urban and rural communities. To keep the whole complex BHC enterprise moving forward, the Foundation had to develop new organizational competencies, structures, and practices. Within this ever-evolving landscape, the consistent engagement and focus of the TCE board proved critical. We examine this arena next, as it is one that often confounds foundations engaged in long-term, complex work.

Strategies for Sustaining Board Engagement

Long-term community and systems-change work is notoriously challenging for foundation boards. The work takes place at many levels with many partners; the pace is often slower and more circuitous than anticipated; measures of success are often "soft" and can raise questions about the value of the investment; and both local context and larger macro forces shape the work in unforeseen ways. Efforts to make systems and policies more equitable and to elevate the voices of communities that have been historically marginalized inevitably face political pushback that can become dicey. Some boards start off enthusiastically but find their interest flagging when measurable impacts are not (perhaps unrealistically) forthcoming, other compelling needs compete for their attention and resources, and/or original champions rotate off the board and new members lack ownership of the work.[3]

The TCE board never wavered in its support for BHC. Our study suggests seven strategies that respondents identified as key to effective board governance of BHC.

1. Establish Commitment to the 10-Year Timeline at the Outset

The TCE board approved the vision and broad outlines of BHC in 2007, three full years before the Foundation's 10-year commitment officially began. Before giving its approval, the board did its homework. It reviewed the experience of other place-based initiatives, examined relevant data, and heard from speakers who talked about the complexity and long-term nature of the work. It also heard from staff about the operational implications of adopting BHC's vision, such as staff changes, payout planning, transition planning for grantees that would no longer receive support, and communications. This process helped equip board members to champion BHC in their own settings and networks.

With a 10-year commitment established, potential new board members were recruited with this explicit understanding in mind. All our respondents confirmed that when they joined the board, they were clear on BHC's timeline and the rationale for it. This understanding meant that governance was focused on responsible spending

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[3] An example is FSG (2011), *Gaining Perspective: Lessons Learned From One Foundation's Exploratory Decade.* While other foundations have experienced similar challenges, few have produced reports that are available publicly.

while staying the course, implementation issues rather than entirely new program ideas, and positioning the work to have maximum impact in the shifting political and economic environment.

Takeaway: Boards need time to develop a deep understanding of the nature of community and systems-change work and to commit to a long-term timeline, which can then be reinforced regularly by staff and outside speakers and passed along to new board members. These governance supports cushioned BHC against potential external and internal challenges had, for example, there been CEO turnover during the initiative's decade of implementation.

2. Maintain Some Resource Flexibility

Another way of securing the board's robust and enduring commitment to BHC, as well as balancing what is sometimes referred to as "being nimble versus staying the course," was to build in some resource flexibility. About 10% to 20% of TCE's program budget remained in reserve to allow for opportunities that fell outside of the initiative's approved budget but were consistent with the results it aimed to achieve. Another source of more modest flexibility was the Foundation policy that enabled each board member to recommend up to $100,000 annually in small grants that struck them personally and were consistent with BHC's overall goals.

Takeaway: Even boards that make enthusiastic commitments to the work that occupies most of a foundation's resources for long periods of time face the inevitable urge to test the limits of the constraints that such commitments entail. Ten years is a long time to maintain a disciplined funding focus. TCE appreciated this dynamic, and enabled board members to, as one put it, creatively "nibble around the edges" of BHC without being distracted in a damaging way by the "next big thing." Building in enough resource flexibility to be responsive and opportunistic while staying disciplined enough to avoid mission creep or diffusion of resources is a balance that boards need to consider upfront and revisit regularly.

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3. Recruit Board Members Who Share Values But Bring Diverse Backgrounds and Experience

With the help of an outside consultant, TCE undertakes a careful vetting process for potential board members. Candidates must have working knowledge about and demonstrated commitment to addressing health disparities and unequal health care access in underserved communities. Some have come from such communities, others work in or study policies affecting them or otherwise engage in promoting health and racial equity and community voice.

TCE aims to have a board with diverse racial/ethnic backgrounds, experience, and perspectives. Each member brings expertise, networks, and deep knowledge about the dynamics and politics of different geographic regions and populations. The vetting process also shares TCE's list of core values designed to guide its funding decisions and promote its mission, another way of communicating to board candidates the guiding ethos and beliefs that permeate the organization.

Takeaway: Addressing inequities and injustice is at the heart of TCE's mission. Some board members describe it as a calling. There is, however, a fine line between shared core values, which can facilitate effective governance, and lack of ideological diversity, which can undermine effectiveness. Finding that sweet spot calls upon foundation boards to be intentional about

Reflective Practice

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recruiting diverse perspectives even if board discussions occasionally become more challenging.

4. Build a Board Culture of Respect, Engagement, and Self-Assessment

TCE board meetings occur quarterly over three days following careful leadership and committee planning and substantial material review by attendees. Board members are paid for their time, and attendance is consistently high; they reported taking their participation seriously, feeling their views are heard, and bonding around a shared mission in which all are deeply invested. They also described a collegial, collaborative atmosphere attributed, in part, to the CEO's relational style and preference for making decisions by consensus when at all possible. After rotating off the board, members achieve emeritus status and are invited to a biannual TCE board meeting to get updates about the work as they continue to serve as ambassadors for TCE in their own communities and networks.

As part of its commitment to maximizing the effectiveness of the board as a governing body, TCE has developed a set of practices for evaluating and improving the board's own performance. First, the board assesses itself as a whole on a biannual cycle, with an internal review conducted by the governance committee one year, and, in the next, a more in-depth process of self-reflection facilitated by a consultant.

Secondly, the performance of individual board members is assessed annually and at the end of each three-year term as part of the reelection process. Members' contributions are reviewed separately by committee chairs and the board chair with particular attention to attendance, preparation, and engagement, which is defined in an internal Foundation document as the "degree to which the Director shares responsibility and accountability for the Foundation's financial health, operational integrity, and programmatic impacts." The overall goal is to help each other be productively engaged in their shared oversight role. As one board respondent noted, "the board does a pretty good job of self-correcting"; when a member's behavior is not aligned with the culture of the organization, it is called out in order to protect the overall quality of board performance.

Takeaway: The capacity of a board to reflect regularly on its own performance contributes to a strong board culture that reinforces productive engagement and a sense of accountability to one another. As a foundation's focus changes direction or adds the use of new philanthropic tools, as TCE did with BHC, the board can review its performance expectations individually and as a group to make sure they stay aligned with the nature of the work.

5. Embrace an Activist Role Within Established Limits

From the outset, BHC was structured to work in two parallel, ideally synergistic arenas: 14 local communities and statewide policy and systems change. Designers knew that focusing only on "place" would not lead to the scale of change that was needed. In approving the policy and systems-change work, the board understood that TCE was taking on an inherently political role that would require the Foundation to become a strategic player itself as well as support the voice and capacity of others working toward change.

Several years into BHC, the Foundation recruited new counsel and instituted a clearer set of guidelines and procedures for addressing issues like lobbying and conflict of interest. Rigorous and regular compliance training for board members

Reflective Practice

is accompanied by ongoing staff monitoring. Board members reported widespread trust in the procedures in place to protect TCE from crossing the line into illegal activities or those likely to draw scrutiny in a way that could ultimately undermine foundation effectiveness. When asked what made them comfortable given how many foundation boards express worry about operating in this space, they all indicated that having "clear guard rails" and staff monitoring their decision-making allowed them to embrace the Foundation's role as change agent. No board member questioned the value of an activist stance as a necessary ingredient of TCE's policy and systems-change work and, over time, they became increasingly gratified with the Foundation's influence in the state capital, Sacramento, and comfortable with entering litigation in areas of immigration, food stamps, and other issues affecting the health and well-being of the underserved.

Takeaway: Foundations bring more than grant funds to the enterprise of social change. The shift to more ambitious and strategic roles requires a new use of money, knowledge, networks, credibility, and political capital in order to promote philanthropic goals (Kubisch, Auspos, Brown, & Dewar, 2010). By learning about the use and limits of these different tools and practices, a foundation board can get comfortable exerting the full weight of the foundation's assets in the service of equity and systems change. Clear organizational guidelines empower board members to provide leadership in this arena when appropriate while also investing in building the capacity of the advocacy and policy-change ecosystem more broadly.

6. Encourage Active Learning and Exchange

TCE recognized early on how important it was to help board members understand BHC's work on the ground and instituted two mechanisms through which to further board contact with sites. First, it held periodic meetings at or near each of the 14 BHC sites. Secondly, each board member "adopted" a site to visit at least annually. TCE developed guidelines for these relationships, which included learning questions to consider during the visit and then reflect upon

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in subsequent board discussions. These practices operated for roughly five years and were then discontinued as the board and TCE began strategic planning for the post-BHC period. Board members reported that even though it was a time- and resource-intensive process, visiting the sites made the work real for them and reinforced their commitment to BHC's timeline.

Takeaway: At the core, board members must understand and learn from a foundation's work in a way that is sufficiently deep and continuous to enable them both to provide effective oversight and accountability and to become powerful champions of the foundation's agenda. Seeing the work firsthand makes it real in a way that reports cannot. The challenge is: 1) how to do this in an authentic (i.e., not rehearsed or overly curated) manner that is not too time or resource intensive for either staff or partners; and 2) how to maximize the learning board members take away to inform their governance role. This is a challenge worth struggling with even as each foundation has to find its own vehicles for doing so that are consistent with the nature of its work and its own learning style and culture.

7. Ensure That Evaluation Serves an Accountability Function

BHC's 2007 animating (internal) document, *Vision for 2020,* described one of the significant changes from TCE's previous funding direction

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as increased "accountability for results." Pledging this kind of accountability and actually implementing it with consistent evaluation data is a lot easier said than done. Like other foundations, TCE struggled with the daunting conceptual and technical challenges to evaluating the ever-evolving multisite, multilevel work of BHC (Kelly, Brown, Yu, & Colombo, 2019).

As TCE's thinking about power evolved over the decade, so did BHC's measures of success from changes in population-level health outcomes to north-star goals more directly tied to its power-building strategies aimed at achieving health equity over the long run. At the same time, broader changes in the evaluation field resulted in a deeper understanding about the need in long-term, complex social change work for a dynamic evaluation and learning system. Included in this system would be multiple components tailored to the different needs of its different users, as well as methods and mechanisms for making meaning of the whole. One of these users would be the board, where a focus on "accountability for results" is of special concern.

TCE board members learned about contributions in support of specific policy and community "wins," but they were unsure how to interpret these successes in the larger context: How could they tell whether these results represented significant impact or not so much given the large investment of BHC resources over time? As one board respondent reported, "At a bluntest level, how do we know we're getting our money's worth? Or should we be using the resources differently toward the same aim?

It's not that we don't trust the staff, but we really want to make sure BHC is succeeding as quickly and as fully as possible."

Notwithstanding this uneasiness, board members appreciated the long-term nature of the work and the challenges of measuring impact in sites very different from each other, impacts that are affected by so many factors besides BHC. They were also able to resist a dynamic that has plagued other foundations whereby the board seeks to identify, measure, and claim credit for the unique contribution its resources have made to any one outcome.

Takeaway: Because boards want to fulfill their accountability function effectively, foundations need to, first, place a high value on the role of evaluative data in decision-making and, second, design an evaluation and learning system that supports the goals of the work. Many approaches to designing such a system exist, but at its core it should include a small number of realistic, but robust as possible, indicators (or "vital signs") of progress toward north-star goals. These might involve specific policy "wins," measures of citizen engagement and justice system involvement, neighborhood affordability, and so forth. Such measures are only as good as the larger evaluation and learning system in which they are embedded and should not be overvalued in relation to other sources of data and learning. Nonetheless, articulating such indicators increases the likelihood that all parties agree about what the work is concretely intended to achieve; if the work takes dramatic turns toward new goals, the indicators can be changed. Some "simple" if imperfect indicators measured consistently over time can constitute a starting point, rather than the last and final word, that serves to boost board confidence in its accountability role.

An Additional Asset: The Board/Executive Relationship

A longstanding and productive working relationship between a foundation's CEO and board is a huge asset for foundations supporting complex, long-term work. TCE enjoyed the continuous leadership of Dr. Robert K. Ross, president and

chief executive officer, who was an early architect of BHC's planning period and continued through its decade of implementation. Board members attribute a very productive board/CEO relationship to this stability and to what one respondent referred to as the CEO's "inspiring, authentic, and sometimes disarming style." The accrual of trust between the board and a CEO helps build the entire foundation's capacity to learn and adapt in light of missteps, changing context, and new opportunities. This is the story with BHC. One example of this learning cycle comes from TCE's efforts to establish its "proximal ally" role at the outset.

With the wisdom of hindsight, it is clear that in the early stages of BHC, the Foundation faced difficulties moving too quickly, sufficiently understanding local power and race dynamics, establishing clear and consistent mutual expectations with partners, and managing dynamics of power and control — all familiar challenges in partnerships between foundations and communities. A foundation can consider early missteps as a necessary period of trial and error, but the cost to the participating communities in terms of trust and social capital can be incalculable.

An extensive Community/Stakeholder Engagement Study (Farrow & Rogers, 2017) was conducted in BHC's seventh year to solicit feedback from key partners, external observers, and community participants. TCE leadership shared its overarching takeaways from the study in an open letter to colleagues, partners, and grantees:

> We need more humility from TCE, and less arrogance; we need more true partnership, and less top-down; we need more input into decisions, and not merely communications about decisions that have been made; we need more of an emphasis from TCE on building our capacity to lead change, and less "doing and directing" from TCE staff.

Using this feedback, TCE leadership talked candidly with the board about the need for internal changes if the Foundation was to optimize BHC's potential.

Robert K. Ross summed up for us TCE's experience with BHC: "We set out to transform communities, but we were the ones who ended up being transformed." TCE took on new roles and developed new capacities to promote health and racial equity.

Over time, TCE learned how to listen better and adjust its role as proximal ally. What Ito and Pastor (2018) have referred to as BHC's "pivot to power" represents one of these adjustments. When residents insisted "it's about power," TCE was flexible enough to adapt its own role in convening and funding to prioritize power building. When young people spoke passionately about school discipline/pushout issues and restorative justice at an open forum at a TCE board meeting, the Foundation listened and then incorporated those goals into the body of BHC's work. Inspired by that work, Ross appointed a President's Youth Council to provide him with a formal mechanism to incorporate the unfiltered voices of young people in an advisory capacity. Ross shared with us that his proximity to them "has changed my view of young people as agents of change."[4]

Talking openly with board members about the needed changes — inviting the external study team to present the findings, however critical, and soliciting their candid discussion — drew upon and reinforced trust between board members and the CEO and enhanced the possibilities for improved practice throughout the organization. Indeed, the call for less "doing and directing" shaped the way TCE staff implemented all its roles in BHC's final years. As program managers gained a deeper appreciation

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[4] Terriquez and Serrano (2018) and Terriquez (2019) convey youth voices in their examination of TCE's work with youth.

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for the power ecosystem of each of their communities, they reported in interviews becoming more adept at "recognizing where the energy is," navigating conflict, backing off when appropriate, and "helping communities to evolve rather than attempting to dictate outcomes." Foundation leadership expressed an increased willingness to consider multiyear and general operating support grants, not heretofore a common practice at TCE. Statewide staff gained new perspectives on how to better incorporate community insights, feedback, and genuine participation into more effective strategic messaging and narrative development. Collectively, their experiences helped inform TCE's institutional transformation to embrace a different approach to place-based power building focused on racial equity. As Ross shared with us, "we achieved a better balance as a health foundation by owning up to power and race."

Reflections

Robert K. Ross summed up for us TCE's experience with BHC: "We set out to transform communities, but we were the ones who ended up being transformed." TCE took on new roles and developed new capacities to promote health and racial equity. The Foundation also worked hard to make sure the board was engaged every step of the way. Other reports point to the evolution of BHC's ideas and its specific

accomplishments, while our inquiry began by asking "What does it take?" for a private foundation to succeed in such a complex endeavor.

While perhaps not definitive, these four reflections on common philanthropic challenges provide a good starting place. None is unique to BHC, nor "new," but philanthropy can sometimes ignore the lessons of the past so perhaps they bear repeating from time to time. Like other foundations, TCE was able to address them to some degree throughout BHC, but all four of these vexing practice issues would benefit from sustained philanthropic attention and creative problem-solving.

1. It takes thinking outside of an "initiative" box. Looking ahead, one can now more clearly observe the limitations that the frame of a time-limited foundation "initiative" places on not only the conduct of the work itself, but how the foundation sets about to learn from it. The label "initiative" implies novelty, and instead of building directly on existing community assets, it typically necessitates the creation of new structures, jobs, and even organizations that will have to be sustained or discontinued once the foundation's attention has moved on. BHC was TCE's creation, and a very significant investment of its capital and reputation. An "initiative" framework also lends itself to an over-emphasis on a foundation-driven, theory-heavy conceptualization of the work, with accompanying goals, objectives, and plans for implementation developed by foundation staff. Foundations typically face big hurdles in recruiting other funders to "join" their initiatives or pick up the slack when they wind them down.

Much of the Foundation's initial framing of BHC was later discarded in favor of a more community-centric approach. As TCE expanded the initiative paradigm's role of the funder, it also opened itself up to a different kind of reciprocal learning relationship with its partners. Instead of treating all 14 sites similarly as an initiative "cohort," it increasingly permitted more flexibility in local funding strategies based on the particular opportunities that each site's unique history and political context afforded. This, in

turn, helped shape TCE's growing understanding of the power ecosystem in which each site was embedded and the change strategies likely to succeed.

2. It takes thinking hard about the nature of foundation-community partnerships. BHC has demonstrated the value of investing deeply in relationships. By choosing to operate as a "proximal" partner to its chosen communities, it manifested necessary patience and the kind of sustained face-to-face contact necessary to build trust. That approach was essential in communities with long histories of broken promises and unfulfilled commitments from outsiders seeking to effect change. It took years for trusting relationships to be established, forged in moments of difficulty as well as success.

A foundation's proximal relationship with a community differs from one that is embedded, as when a foundation actually is part of the community, or one that is established through an intermediary, or one in which a foundation plays a cultivation and support role (Easterling, Gesell, McDuffee, David, & Patel, 2019). The pros and cons of these and other possible partnership arrangements should be examined carefully upfront when a foundation decides to work with a community. Each one suggests a different role for foundation staff, a different set of governance challenges for boards, and a different way to deploy foundation resources. The choice depends on such factors as the foundation's mission and goals; the time and resources it needs to spend to "get ready" internally to be a competent partner; its willingness to share power and decision-making; and its long-term vision for the relationship in light of its institutional goals.

3. It takes a management culture that values learning. Foundations often play a vital role in learning in multisite and complex work. They can foster individual site learning, organize cross-site learning venues, and aggregate learning to identify broader patterns and takeaways. But what foundations frequently undervalue — and underinvest in — is their own capacity to learn and grow as an organization. This underinvestment hinders the ability of management

> *[W]hat foundations frequently undervalue — and underinvest in — is their own capacity to learn and grow as an organization. This underinvestment hinders the ability of management to create an open and inclusive learning culture throughout the foundation and slows the pace of strategic pivots and innovation.*

to create an open and inclusive learning culture throughout the foundation and slows the pace of strategic pivots and innovation.

Like TCE, foundations that support large, multilevel initiatives often face organizational tensions, nuanced or more obvious, among staff assigned to different roles and levels (community versus state policy versus evaluation) or to different sites in which they understandably become invested or to different populations being prioritized across sites. Each group of staff naturally develops its own set of expectations, incentives, loyalties, and informal learning systems. The absence of a cohesive whole, however, can be demoralizing internally and confusing externally.

Foundations often try to address these tensions by reorganizing staff internally, but the barriers can be as much cultural as structural. What is needed is a strong message from leadership and the accompanying supports for developing a shared culture of learning. Operationally, this might mean, for example, that the foundation's vision and values are widely understood and agreed upon throughout the organization; that rewards are built in for collaboration and sharing knowledge and resources; that staff regularly

While everyone is busy making change, someone must take responsibility for overall management of the enterprise. The best ideas and most talented people are unlikely to achieve their full potential if they are not well managed.

examine relevant data for the purposes of collective meaning-making and shared strategy development; and that mechanisms exist for inviting critical peer review and benefiting from the diverse experiences and perspectives of all staff.

Scores of subtle, daily interactions within foundations reinforce some behaviors and values and discourage others. Staff recognize the messages sent in these interactions regardless of what leadership or the organization professes (Hamilton et al., 2005). Candor, curiosity, and humility undergird a vital learning culture. Mutual accountability is key. These are the same values that make for effective foundation relationships with partners and grantees, so it makes sense to invest in their development at "home." Management that accomplishes this aim positions the foundation to communicate clearly and consistently with its external partners and learn much more effectively with and from them.

4. It takes prioritizing change management.
Changemaking is a heady and absorbing undertaking, both energizing and exhausting, as often the work must struggle to maintain forward progress against powerful prevailing headwinds of opposition. The deep emotional complexities of the work, combined with the fact that it tends to be so much more than a job for its participants, call for an enhanced level of attention to the importance of sound management practices at all levels of the enterprise. While everyone is busy making change, someone must

take responsibility for overall management of the enterprise. The best ideas and most talented people are unlikely to achieve their full potential if they are not well managed. This is something of an industrywide challenge for philanthropic organizations, which typically do not prioritize or exemplify state-of-the-art management practices.

The management challenge is exacerbated when an enterprise is as complicated as BHC, with its multiple moving parts and lines of work. There is no substitute for clear expectations and lines of authority, consistent communications, a commitment to coordination, and mutual respect and accountability in order to achieve optimal alignment of effort. Few foundations have consciously designed themselves to operate in that fashion. Staff and board roles, decision-making processes, internal communication channels, performance standards and human resource policies, and grantmaking practices need to be clear, aligned with the foundation's goals, and consistently executed.

The goal is not to put a rigid structure in place, but rather to reduce the amount of energy staff must exert to get things done within the organization. Without this clarity and transparency, staff learn to keep their heads down and focus only on their own agendas, cutting their own deals with management for going forward. Under these conditions, even passionate and talented staff experience low morale or burn out, and can disengage from the organization in ways that undermine its collective potential.

A Final Note
BHC was a conscious effort to take on new roles and broaden the boundaries of a traditional funder-grantee relationship. TCE's recent commitment to making racial equity a priority provides the opportunity to recalibrate those roles and relationships once again. What that will mean for the next generation of TCE's work remains to be seen. But it suggests the possibility of shaping its role in a larger ecosystem to address the questions that all foundation boards and leaders visit and revisit periodically: What role is the foundation particularly well positioned to play in light of its goals and capacities?

And how can that role build on and enhance the roles of other players in that ecosystem to achieve maximum impact? Rather than support another foundation-designed, time-limited "initiative," TCE can explore multiple partnerships of different kinds with different communities, organizations, and other funders that can align interests and resources to promote the shared goal of racial equity. Through its experience with BHC, TCE brings much to the table for such an enterprise.

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Reflective Practice

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Reflective Practice