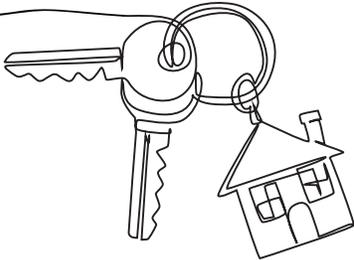


Second Edition



Stories of Change:

How a Systems Change Approach
is Transforming a Region



*New discussion
guides inside.*

Jessica Conrad with



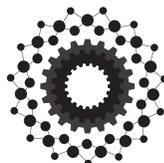
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Resources for change.

Stories of Change:

How a Systems Change Approach
is Transforming a Region

Jessica Conrad with



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Acknowledgements

Stories of Change would not have been possible without the contributions of so many who are deeply committed to creating communities where all can thrive, including our storyteller, the dozens of changemakers interviewed for the project, and Rotary Charities' board and staff members, past and present.

Place-based systems change involves many people working across sectors and fields. The stories told here are collective stories of and for the communities from which they have come, and great care has been taken to tell the truest stories possible. Yet with collective stories, there is not one truth, but many. We acknowledge that the stories included here may not represent the whole truth for all involved.

We are deeply grateful for those who have contributed their memories and perspectives to support us in documenting this transformative work and for the skillful storyteller who has woven these threads together to create this narrative tapestry.

About the author

We want to thank storyteller Jessica Conrad for expertly leading this project. Jessica handled each story with care and dedication—careful with its complexity, shared language, and multiple perspectives. Her process embodied values like patience, relationship building and trust, clear communication and roles, and inclusivity, reflecting a deep grounding in systems practice.

For over a decade, Jessica has been working at the frontiers of positive change as a researcher and writer, storyteller, communications strategist, program manager, and curriculum designer. She brings extensive experience designing and delivering strategic initiatives and transformative learning opportunities—including graduate-level courses focused on systems and complexity theory and leadership—in her previous roles at the RE-AMP Network, the Blekinge Institute of Technology, Forum for the Future's School of Systems Change, and, most recently, the Garfield Foundation. While with the Foundation, Jessica contributed to its collaborative networks portfolio and stewarded a community of practice for grantee partners leading large, multi-stakeholder projects focused on equitable climate change, cancer prevention, community development, and food solutions.

Jessica currently supports purpose-driven people and organizations in a consulting capacity with research and writing, coaching, facilitation, and custom offerings in the realms of leadership, storytelling and communications, organizational learning and development, and program design. You can reach her at hello@jessicaconrad.com.

Contributors

We want to thank everyone interviewed for *Stories of Change*, including Tina Allen, Maureen Clore, Tara DeGroot, Ari Elaine, David Van Horn, and Ashley Halladay-Schmandt representing the Northwest Michigan Coalition to End Homelessness. Christina Barkel, Mary Clulo, Jan Delatorre, Meghan McDermott, Taylor Moore, Val Stone, Sammie Stroh, Lisa Tanner, Kris Thomas, and Anneke Wegman representing the Healthy Food Access Partnership. Erin Barrett, Sarah Eichberger, Rose Fosdick, Sara Johnson, Emily Llore, Paula Martin, Jenifer Murray, and Jane Sundmacher representing the Northern Michigan Community Health Innovation Region. As well as, Lorraine Beers, Marlene Bevan, Freya Bradford, Becky Ewing, Kristin Hettich, Jeff Hickman, Kendra Luta, Greg Luyt, Homer Nye, Miriam Owsley, Marsha Smith, and Sakura Takano representing Rotary Charities of Traverse City. We would like to express our sincere gratitude to you all for your time, for sharing your perspectives and experiences with systems change—and, most importantly, for your critical contributions to the work of creating an adaptive and thriving Northwest Lower Michigan.

Rotary Charities of Traverse City

Rotary Charities of Traverse City is a 501c3 grantmaking public charity. It was founded in 1976 after oil was discovered on property owned by the Traverse City Rotary Club. The organization provides grants, impact investments, and opportunities for connection and learning across a five-county area in Northwest Lower Michigan to contribute to an adaptive and thriving region for everyone.

Learn more about Rotary Charities at:

Website: www.rotarycharities.org

Facebook: www.facebook.com/rotarycharities

Instagram: www.instagram.com/rotarycharities

LinkedIn: www.linkedin.com/company/rotary-charities-of-traverse-city

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Foreword

We live at a time of great unpredictability, defined by global emergencies: accelerating climate change, food insecurity, social injustice, the threat of pandemics, eroding trust, and more. With more attention given to the systemic nature of these problems in recent years, we've seen growing awareness of how complex and deeply interconnected they are. Meanwhile, those of us working to create more fair and thriving communities share an ever-increasing desire to make a greater impact. Yet we're finding that our traditional practices simply don't seem capable of transforming the conditions that hold our most wicked problems in place. Now more than ever, we seek promising alternatives.

*"There is too much bad news
to justify complacency.
There is too much good news
to justify despair."*
— Donella Meadows

For decades, charitable organizations like ours have generally focused on addressing the *symptoms* of problems like those above in an effort to help individuals beat the odds. In the search for alternatives, however, more and more organizations are shifting to focus on addressing the *root causes* of problems to change the odds for those who are most vulnerable to their consequences.¹

For us, it means supporting cross-sector collaboration aimed at addressing the upstream conditions that create complex community problems. We've been on a journey with our community in Northwest Lower Michigan since 2014 to adopt this way of working: a systems change approach. One of the stories featured here is our own and shares our journey of turning inward to reflect on both our own ways of thinking and acting, and the practices we have adopted in the process of launching a new program area that targets the underlying causes of complex community problems. More importantly, three additional stories of change feature regional initiatives resolved to address youth/young adult homelessness, food insecurity, and barriers to health and health equity using a systems change approach.

Beyond sharing these stories to empower new forms of changemaking locally, we are delighted to contribute our collective learning to the broader field of systems change. Despite its growing popularity, a systems approach can be difficult to make sense of, let alone apply—even for those of us who are deeply engaged in the work. There seems to be a critical gap between the amount of innovative work underway in the field, and the number of available stories of systems change in action. We hope to help bridge that gap and meet the needs of practitioners who are looking for examples of people putting theory into practice.

We want to thank everyone who has been on this journey with us. No matter how small or large a role you have played in this work, your voice and perspective matter. The work of building a fair, thriving, and resilient region demands participation from us all. Together we can create enduring change.

Sakura Takano,
CEO, Rotary Charities of Traverse City

Freya Bradford,
Director of Systems Change & Learning, Rotary Charities of Traverse City

¹Thanks to Forum for Youth Investment CEO Karen Pitman for the valuable "change the odds" framing.

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About This Document

Who these stories of change are for

These stories of change are for community members, changemakers, organizations, multi-stakeholder initiatives, funders, and other social sector institutions who see the opportunity of this time to explore systems change as a pathway for addressing our most pressing social and environmental challenges. It is for those who seek stories of impactful changemaking in action and pragmatic reflection on what purpose-driven collaboration requires. It is for anyone who seeks renewed hope in our ability to change the odds in favor of communities where everyone can thrive.

Methodology

This document contains four case studies, three featuring the evolution of multi-stakeholder systems change initiatives in Northwest Lower Michigan—the Northwest Coalition to End Homelessness, the Healthy Food Access Partnership, and the Northern Michigan Community Health Innovation Region—and a fourth sharing the story of how Rotary Charities of Traverse City itself came to support systems change work. Each selected initiative has a years-long relationship with Rotary Charities and has been using a systems change approach long enough to begin seeing shifts in the complex community problem it seeks to address. Rotary Charities contracted with outside consultant Jessica Conrad, who specializes in research, writing, and storytelling, to document how each initiative uses a systems change approach to affect positive change.

Research for all four case studies began with a review of documents, including annual reports, program descriptions, grant applications and evaluations, grant criteria, presentation decks, and meeting notes, among other resources. Thirty-five individuals were interviewed by the author in either one-on-one interviews or focus group discussions in August or September 2022. Focus groups were prioritized whenever possible to support mutual learning and connection among participants.

Each draft case study went through a participatory review process to capture, as accurately as possible, the diversity of perspectives that have informed the collaborative work. The process centered the core values of diversity, inclusion, accountability, and learning.

The place where this work unfolds

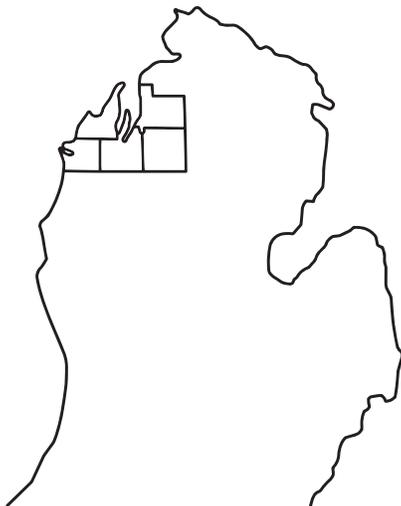
The four case studies are rooted in a place that spans multiple counties in Northwest Lower Michigan. The people, organizations, and initiatives—and the relationships among them—that bring these stories to life cannot be separated from the history, geography, and culture of the region. Place-based systems change work honors this important context and leverages the relationships, shared experiences, and values nurtured by a common place.

The original inhabitants of Northwest Lower Michigan are the Anishinaabek, the people of the Three Fires Confederacy of the Ojibwe, Ottawa, and Potawatomi, and today, the Grand Traverse Band of Ottawa & Chippewa Indians reservation is located within the five-county region. Native Americans make up about 2% of the region's population, Latino people account for roughly 3%, and white people make up 95%.²

The rural area of Northwest Lower Michigan is known for its natural beauty, with coastal sand dunes along Lake Michigan, numerous inland lakes and rivers, glacier-carved hills, and beech-maple forests. The lake-effect climate makes the area favorable for fruit production, and picturesque cherry and apple orchards, vineyards, and family farms dot the landscape between quaint villages and towns—the largest being Traverse City with a year-round population of close to 15,000. Tourism is an integral part of the economy, swelling the five-county region's population from about 179,000 to 319,000, an increase of 78%, in summer months.

The idyllic setting and outdoor recreational opportunities make the region popular for summer homes, vacation rentals, and remote workers. Alongside this affluence, however, there is significant wealth disparity. "About 40% of people in the region are struggling financially³ and can't afford basic necessities," says Seth Johnson, executive director of United Way of Northwest Michigan. Housing prices are significantly higher than in other areas of the state, and average wages are lower. These factors are entwined with others, like a significant lack of early childhood care and learning opportunities, small businesses struggling to find employees, aging infrastructure, and increasing mental health challenges, especially for young people.

The five-county region has over 2,000 nonprofit organizations,⁴ 85 units of local government, and several emerging social enterprises responding to these shifting conditions and improving the lives of residents. Many are banding together in networks and coalitions looking for new solutions to the region's most complex problems, much like the multi-stakeholder systems change initiatives featured here in *Stories of Change*.



The work featured in Stories of Change takes place in Antrim, Benzie, Grand Traverse, Kalkaska, and Leelanau Counties in Northwest Lower Michigan.

"Place-based change is a long-term approach to identifying, understanding, and addressing social issues. It uses a recognized area to draw and lock in resources, expertise, and experience."

— Renaisi

² This data comes from the census, and we acknowledge that this source is not always an accurate reflection of the community. Available from: <https://www.census.gov/quickfacts/fact/table/kalkaskacountymichigan,leelanaucountymichigan,grandtraversecountymichigan,benziecountymichigan,antrimcountymichigan,US/PST045222>

³ Here, *struggling financially* means that people are either living below the Federal Poverty Line (FPL) or living above the FPL yet unable to afford basic necessities. Available from: <https://www.unitedforalice.org/michigan>

⁴ Available from: <https://www.taxexemptworld.com/organizations/michigan-counties.asp>

What you will discover in the pages that follow

Stories of Change delves deeply into four inspirational stories unfolding in Northwest Lower Michigan. This document is meant to be read from beginning to end, as the sections preceding the case studies introduce systems change theory that provides important context not just for the content of the stories but also for how they are organized. The case studies can be read independently, however, so feel welcome to skip ahead to one that may be of special interest.

Below is a brief summary of what you'll discover in the pages that follow:

- The "Introduction" includes a discussion of what makes a community challenge *complex* and what the complexity means for changemaking. This section also touches on Rotary Charities' motivations for adopting a systems change approach and includes summaries of the four case studies.
- The section "Using a Systems Change Approach to Address Complex Community Issues" introduces four phases of development that multi-stakeholder initiatives commonly progress through while using a systems change approach. The section describes the four phases of systems change and points to resources in the field for guidance on how to put them in motion. It also provides valuable context for the three case studies featuring multi-stakeholder initiatives, as they are organized into the four phases of systems change.
- Next, you will discover the four case studies themselves. The first, "Rotary Charities of Traverse City: From Charity to Changemaker," shares Rotary Charities' journey as a place-based funder to discover what it takes to make more enduring progress on complex community challenges. Then, "A Story of Change: Ending Youth Homelessness in Northwest Michigan" explores the Northwest Michigan Coalition to End Homelessness' efforts to end youth/young adult homelessness. Next, "A Story of Change: Securing Healthy Food Access in Northwest Michigan" dives into the story of the Healthy Food Access Partnership's work to address local food insecurity. Last, "A Story of Change: Improving Health and Health Equity in Northern Michigan" explores the Northern Michigan Community Health Innovation Region's efforts to address barriers to health and health equity across the region.
- The section "Insights from Systems Change in Action" offers five key insights that emerged across the four case studies. These insights point to the practices that have accelerated changemakers' progress in transforming the systems at the heart of the complex community issues they seek to address.
- Finally, this second edition includes brand new reflection and discussion guides tailored to three different audiences. Since launching the first edition of *Stories of Change*, the publication has traveled the globe, reaching practitioners, funders, and capacity builders in 41 countries. The stories are providing new clarity about the nature of systems change work, inspiration, and hope. Rotary Charities continued its work with *Stories of Change* author Jessica Conrad to develop what they heard was needed next — help turning new insight into action. Each guide targets a different audience: funders, experienced systems change practitioners, and those new to systems change but curious about its potential. The guides can be used for individual reflection or, ideally, individual reflection that is then processed with a group of stakeholders committed to a common goal.

Stories of Change offers a unique look at what's possible when many individuals, organizations, and initiatives adopt a shared approach to affecting positive change and align their efforts to address the upstream sources of our toughest community challenges. Full of actionable insights, the case studies are an informative example of purpose-driven collaboration and a source of hope in an unpredictable, fast-changing world.

Introduction

Rotary Charities of Traverse City is not alone in wondering why traditional practices for changemaking simply don't seem capable of transforming the conditions that hold Northwest Lower Michigan's most pressing community problems in place. *Stories of Change* shines a light on the many individuals, organizations, and initiatives who are responding to the question by experimenting with a systems change approach—one that seems capable of supporting changemakers in addressing problems at their source to *change the odds* for those who are most vulnerable to their consequences. This section explores complex problems and why they require a systems change approach. It also includes summaries of the four case studies at the center of *Stories of Change*.

What are complex problems, and why do they require a different approach?

Some problems persist despite the efforts of strong nonprofit organizations, faith-based communities, philanthropy, government, and business. They include problems like homelessness, food insecurity, income inequality, declining mental health, climate change, and biodiversity loss, among many others that prevent our collective ability to thrive. These problems are complex (as opposed to simple or complicated) and are defined by adaptive, interconnected, emergent, and non-linear qualities with essential implications for decision-making and strategy.⁵

Since complex problems contain an enormous number of variables, it's impossible to predict how we might achieve a desired outcome through a predetermined set of steps. It is possible, however, to navigate complexity by intentionally exploring the unique context of any given complex problem or system. In other words, complex problems don't

have straightforward solutions, and this reality means we must build our capacity for different ways of approaching them.

Complex problems require a different way of seeing and acting in the world than most of us are accustomed to. Observing and making sense of a system's behavior requires gathering enough diverse perspectives to see the system more completely and to identify the problem's root causes. No single person or organization can solve a complex problem on its own. In the absence of a clear set of steps or "best practices," what's needed are collaborative practices that support multiple stakeholders in testing several possible actions to shift a system toward more positive outcomes.

Given this, leading in complexity calls on us as individuals to clarify our purpose, core values, and personal resolve for contributing to the important work of tackling society's most pressing issues. It requires us to cultivate our curiosity, empathy, and listening skills for engaging multiple perspectives, to learn for continuous improvement, and to draw on our imagination to envision different futures. It also invites us to improve our adaptability and resilience to respond to ever-shifting contexts.⁶

"It seems so simple to say you need to 'listen to understand.' It's much more challenging in practice to come without preconceived notions about the system and really focus on asking questions to understand it better. Getting to root causes is very challenging. You think you know where you're going, but in reality, you can't know where you're going in advance."

— Emily Llore, *Community Health Assessment and Improvement Planning Director, Northern Michigan Community Health Innovation Region; Community Health Planner, Health Department of Northwest Michigan*

⁵ Given these qualities, the domain of complexity seems difficult to navigate at best. Thankfully there are several sense-making tools, such as the Cynefin framework, developed by David Snowden, that help distinguish complex problems from other types of problems.

⁶ *Simple Habits for Complex Times* (Stanford Business Books, 2015), by Jennifer Garvey Berger and Keith Johnston, is a resource for leaders seeking powerful practices for leading in complexity.

"What some people dismissively call 'soft skills' are exactly what builds the necessary foundation for complex work. By bringing our vulnerability, curiosity, and learning mindset, we open the pathway to trust, authenticity, inclusivity, and creative thinking—all essential elements of systems work."

—Becky Ewing, former Executive Director,
Rotary Charities of Traverse City

What is a systems change approach?

Taking a systems change approach is one way of addressing complex problems. Today, it's attracting attention based on the promise it holds for supporting people to uncover why, at the deepest level, complex problems exist and to work collaboratively to transform the interdependent conditions that typically hold these problems in place. *Stories of Change* describes a systems change approach in the following way:

A systems change approach supports stakeholders in addressing the causes, rather than the consequences, of a complex social or environmental issue by taking a holistic, or systemic, view and transforming the policies, practices, resource flows, relationships and connections, power dynamics, and mental models that underlie it.⁷ This approach requires deep collaboration between those working on all areas of an issue and those who have experienced its consequences firsthand to affect positive change.

Stories of Change highlights the four phases common to a systems change approach described in greater depth in the section "Using a Systems Change Approach to Address Complex Community Issues."

Why Rotary Charities adopted a systems change approach

Since 2018, Rotary Charities of Traverse City has supported collaborative initiatives taking a systems change approach to address complex community challenges in Northwest Lower Michigan. The

process of arriving at a place to provide this support was a four-year journey, itself a complex and transformative undertaking.

Motivated by a strong desire for greater impact on the region's toughest challenges, in 2014, Rotary Charities set out in search of promising alternatives to traditional practices that weren't adding up to enduring community-level change. Together, the board and staff learned about emerging ideas and trends in philanthropy and changemaking and began asking more pointedly, what would it take to put deep and lasting transformation in motion?

Along with local changemakers and change experts from the field, the Rotary Charities team deepened their learning and experimentation and came to believe that addressing the root causes of complex community problems would require two fundamental changes within their collective work that could be boiled down to *working together differently* and *working on different things*. To make progress on the causes of these problems, changemakers and funders alike would need to work more collaboratively and align their efforts with others working toward complementary goals. This would require greater trust, transparency, experimentation, and learning. In addition, the focus of their collective work would need to shift to addressing the interdependent conditions that hold the region's complex problems in place.

In 2018, Rotary Charities committed to a bold new direction as a place-based funder, formally adopting a systems change approach with the launch of new grant categories and learning offerings. Since then, they have invested nearly \$2.1 million in 20 initiatives taking a collaborative systems change approach to addressing a complex community problem.⁸ Today, grantee partners allocate funding across multiple organizations to support regular convening and learning among partners; conduct assessments, learning, and mapping exercises to find new leverage points within the systems at stake; design and implement strategies to change the systems; and improve their communication and storytelling.

⁷ Kania, John, et al. FSG, 2018, *The Water of Systems Change*, https://www.fsg.org/resource/water_of_systems_change.

⁸ Available from: <https://www.rotarycharities.org/our-grantees>

Rotary Charities also offers changemakers free learning opportunities, including workshops, systems change coaching, and a facilitated community of practice for grant recipients to engage in peer learning around common systems change challenges, such as measuring progress, communications and storytelling, and network health and well-being.

Transparent about the challenges and opportunities Rotary Charities encountered along the way, the case study "Rotary Charities of Traverse City: From Charity to Changemaker" included in the pages ahead shares the organization's journey to becoming a catalyst for transformative change, along with the practices and principles it uses today to act on its new theory of change.

The problems we're attempting to tackle now are much broader. It's much more difficult to figure out where to start, to identify which players in the community are best positioned to help you make that change, and to evaluate how successful you've been. It's a lot thornier."

— Greg Luyt, Board Chair, Rotary Charities of Traverse City

Summaries of the three systems change case studies

In addition to sharing Rotary Charities' story of transformation, *Stories of Change* includes three stories of change featuring multi-stakeholder systems change initiatives addressing the root causes of complex community issues. The stories trace the arc of each initiative's evolution, offering insight into the collaborative processes that strengthen and align initiatives for success and the challenges that can hinder their progress. The following provides a summary of each case study included in the pages ahead.

A Story of Change: Ending Youth Homelessness in Northwest Michigan: Since 2016, the Northwest Michigan Coalition to End Homelessness (NWCEH) has been working to prevent and end the persistent challenge of youth/young adult homelessness

through a coordinated community approach. More than 18 organizations and agencies from across five counties in Northwest Michigan have united behind the shared vision of a community where every youth/young adult has safe, appropriate, and permanent housing.

To advance their audacious goals, NWCEH members have drawn on system change practices to expand their understanding of the system at the heart of their work, to strengthen the connectivity between youth-serving systems, and to create an equitable and resilient homeless response system specifically for youth/young adults. Centering the voices and leadership of youth/young adults with lived experience has been paramount to the work, as has the commitment of everyone involved to the values of collaboration, accountability, and data-driven decision-making.

This story of change shares how NWCEH members and their partners are working together in new ways to bring an end to youth/young adult homelessness and to interrupt the cycle of chronic homelessness that begins for many at an early age.

A Story of Change: Securing Healthy Food Access in Northwest Michigan: Over the last five years, the Northwest Food Coalition, Goodwill Northern Michigan's Food Rescue, and Groundwork Center for Resilient Communities have progressively moved into deeper partnership to strengthen the emergency food system in Northwest Lower Michigan. United by a shared commitment to addressing local food insecurity, the three groups work together to create greater access to healthy food for more than 70,000 individuals at risk of food insecurity across five counties.

From purchasing locally grown food, to rescuing and distributing food, to operating pantries and community meal sites, the role each group now plays is complementary and vital to providing the community with greater access to high-quality, nutritious food. Their collective efforts have bolstered the local food economy and transformed the relationships among the three groups, amplifying their power to sustain healthy food access for all.

This story of change shares how the Healthy Food Access Partnership built on the legacy of two decades of work to address food insecurity in Northwest Lower Michigan by overcoming the challenges inherent to high-level collaboration and adapting in mutually beneficial ways to a rapidly shifting context brought about by the COVID-19 pandemic.

A Story of Change: Improving Health and Health Equity in Northern Michigan: Since 2016, the Northern Michigan Community Health Innovation Region (NMCHIR) has been working to improve health outcomes and health equity for residents living in Northern Lower Michigan. Today, more than 160 cross-sector partner organizations work in coordination across a 31-county service area to improve the social determinants of health—the

conditions in which people live, learn, work, play, and age—to achieve their shared vision of healthy people in equitable communities.

Together, partners draw on systems change approaches not just to break out of silos, but also to build the collaborative capacity required for creating a shared understanding of the broader community system and for aligning their strategies to shift the conditions that perpetuate health inequities and disparities. Thanks to their collective efforts, residents across the region are now benefitting from more fair and just opportunities to attain their highest levels of health.

This story of change shares how NMCHIR partners are strengthening the community system's ability to respond to residents' needs—and transforming individual lives in Northern Lower Michigan.



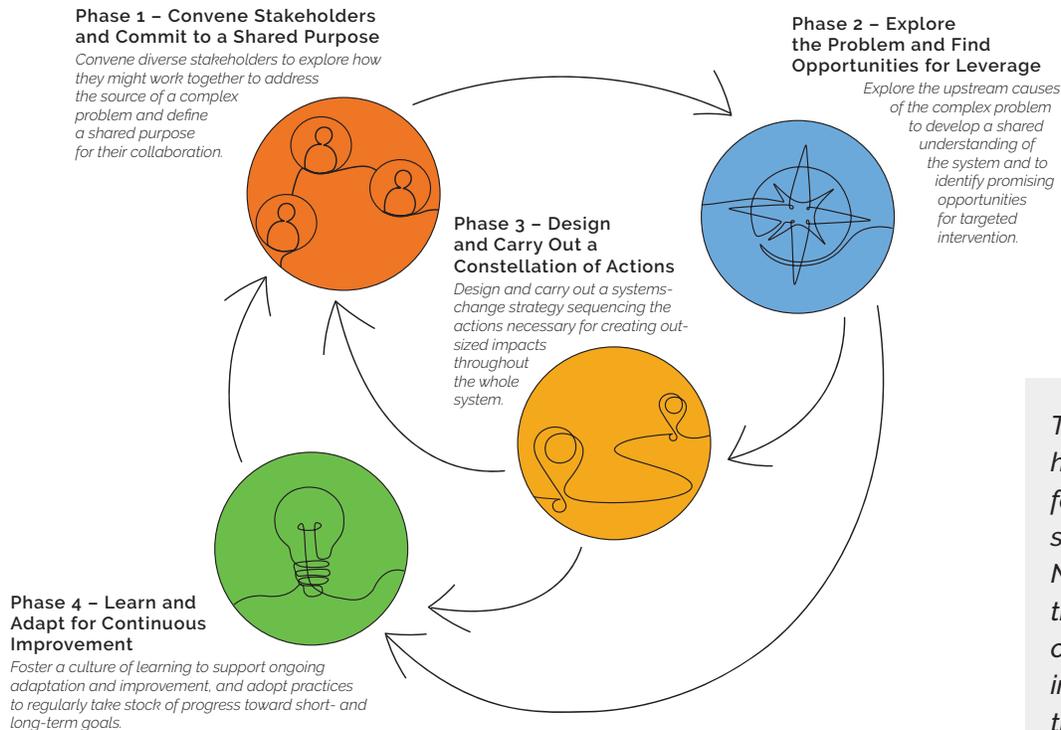
Using a Systems Change Approach to Address Complex Community Issues

The work of solving problems like youth/young adult homelessness, food insecurity, and barriers to health and health equity is, inherently, a long game, and given the complexity of these challenges, no single organization will be capable of moving the needle on its own. It is essential to harness the collective power of a diverse group of individuals and organizations willing to commit themselves to *working together differently* and to *working on different things* to address the upstream sources of these challenges.

The three stories of change are organized into four phases of development that commonly support

multi-stakeholder initiatives in transforming the interdependent conditions that hold complex social and environmental problems in place. Taken together, the phases offer one (but certainly not the only) process that supports changemakers in making sense of the issues they seek to address and aligning their efforts to advance long-lasting change. Although they are presented as distinct and sequential, the phases of systems change weave together in practice to support an initiative's continuous improvement and adaptation in response to changing contexts.

Four Phases of Systems Change



The descriptions offered here share what the four general phases of systems change are. Numerous resources in the field provide guidance on how to put each phase in motion, including the *Systems Practice Workbook*⁹ and Michigan State University's *ABLE Change Process*.¹⁰

⁹ *Systems Practice Workbook*, 2017, <https://oecd-opsi.org/toolkits/systems-practice-workbook>

¹⁰ *ABLE Change Process: Tools and Resources for Community Systems Change*, Michigan State University, http://systemexchange.org/application/files/4515/9111/1141/ABLE_Change_Process_for_Community_Systems_Change_Tools_and_Resources.pdf.

Phase 1 - Convene Stakeholders and Commit to a Shared Purpose



Building a foundation for systems change starts by connecting a diverse group of stakeholders to explore how they might work together to address the source of a complex problem. At their best, these groups include people with lived experience of the problem's consequences and people who bring institutional expertise with different approaches for addressing those consequences in different areas of the system at stake. Participants strengthen the foundation of their change effort when they tend to, and ultimately transform, the relationships between and among them to harness the group's collective power.

Defining a clear purpose is crucial for creating coherence across the group as the initiative takes shape; however it is held lightly and adapted with input from new participants in an ongoing process of co-creation, or "collective discovery."¹¹ Equally important is the task of revisiting and revising the purpose over time as the context surrounding the issue changes.

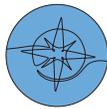
"Transforming a system is really about transforming the relationships between people who make up the system."

— David Ehrlichman, *Impact Networks*

"All of the activities that go into creating a 'we' ultimately build an 'action system' which becomes the foundation for broader social change."

— Cynthia Rayner and François Bonnici, *The Systems Work of Social Change*

Phase 2 - Explore the Problem and Find Opportunities for Leverage



Addressing complex problems requires moving beyond band-aid solutions to explore the upstream sources of the problem that are creating downstream consequences. To locate the sources, the group must first set boundaries for exploring the system at stake. Then they must collect two sets of data, drawing from various sources. The first set focuses on how the problem currently presents itself in their community, exploring questions like: How many people experience it? Who experiences it most severely? What trends might have contributed to it over time? The second set focuses on how the system produces the problem: What policies, practices, and resources are at play? What mindsets are influencing the problem? How are they all connected? The group prioritizes collecting perspectives from individuals with lived experience of the problem while engaging and honoring multiple ways of knowing.¹²

This process helps the group create a shared understanding of the terrain in which they're working, including how they may unintentionally contribute to the conditions that create the need for the proposed initiative. It also helps them identify leverage points or opportunities for targeted intervention that can produce outsized impacts throughout the whole system. Leverage opportunities are typically found within the six conditions of systems change and the interactions between them: policies, practices, resource flows, relationships and connections, power dynamics, and mental models.¹³ This phase also sets the stage for the group to agree on visionary goals for the future state they want to create that will drive their collaboration.

¹¹ Ehrlichman, David. *Impact Networks: Creating Connection, Sparking Collaboration, and Catalyzing Systemic Change*, Berrett-Koehler Publishers, 2021, p. 105-110.

¹² Perry, Elissa Sloane, and Aja Couchois. "Multiple Ways of Knowing: Expanding How We Know." *Nonprofit Quarterly*, 27 April, 2017, <https://nonprofitquarterly.org/multiple-ways-knowing-expanding-know/>.

¹³ Kania, John, et al. FSG, 2018, *The Water of Systems Change*, https://www.fsg.org/resource/water_of_systems_change.

Phase 3 - Design and Carry Out a Constellation of Actions



At this point, the challenge's breadth and depth become clearer. What's needed is a strategy sequencing the actions required to act on the leverage opportunities and advance the transformative change the group seeks to make. The group undertakes a collaborative planning process to design aligned and mutually reinforcing actions that facilitate learning and adaptation and that are, in some cases, carried out simultaneously.

In a more centralized initiative, actions are usually documented and carried out by smaller teams accountable to the group. In a more decentralized initiative, participants carry out actions in a more emergent way without a written plan or timeline. Initiatives often rely on other forms of shared infrastructure as needed—such as governance and participation agreements, communications platforms, and other resources—to support relationship building, enable information flow, unlock creativity, and strengthen alignment across the initiative toward shared goals.

"Meaningful collaboration both relies on and deepens relationship—the stronger the bond between the people or groups in collaboration, the more possibility you can hold."

— adrienne maree brown, *Emergent Strategy*

Phase 4 - Learn and Adapt for Continuous Improvement



Fostering a culture of learning within a systems change initiative is crucial. Through ritualized activities, participants learn from each other's practices, amplifying what enables the desired change while stopping what inhibits it.

Many initiatives rely on a combination of practices to regularly take stock of progress toward their short- and long-term goals: using inquiry questions for ongoing sensemaking, embedding hypotheses within planned actions to create indicators of change at multiple levels, and capturing signals of change through the use of more traditional evaluation techniques and/or newer principles-based approaches designed to accommodate the characteristics of complex challenges.

"Strategic learning is even more important once you realize that it is possibly the only outcome in systems change we can control."

— Mark Cabaj, *Tamarack Institute*

"The key lever in a complex system is learning; the key methods are conversation, discovery, and experimentation."

— Jennifer Garvey Berger and Keith Johnston, *Simple Habits for Complex Times*

In addition to the case study of Rotary Charities' evolution, the stories of change shared in the coming pages highlight the development of three systems change initiatives on the path to solving complex community problems. Thanks to their collective efforts, the systems they seek to transform are showing positive signs of change, including reductions in the frequency of youth homelessness, sharp increases in the accessibility of healthy food through the emergency food system, and fewer barriers to health and health equity. These shifts, among others, result from changemakers' perseverance in creating the conditions for change at the individual, organizational, and systems levels. And, taken together, they are contributing to a more fair and thriving Northwest Lower Michigan.

Rotary Charities of Traverse City:



From Charity to Changemaker

Driven by a vision of a more adaptive and thriving Northwest Lower Michigan, Rotary Charities of Traverse City is a committed partner to changemakers working to address complex problems and create community assets for all. The organization supports nonprofits, Native nations, local governments, school districts, and collaborative initiatives providing services in Antrim, Benzie, Grand Traverse, Kalkaska, and Leelanau Counties with funding and opportunities for connection and learning.

What follows is the story of Rotary Charities' evolution as a place-based funder. It is the story of how the organization's strong desire for greater impact on the region's toughest community challenges inspired a search for promising alternatives to traditional practices—a search that set off a transformation within its culture and grantmaking and ultimately led it to formally adopt a systems change approach. Transparent about the challenges and opportunities that Rotary Charities encountered along the way, this story shares the organization's journey from *charity to changemaker*.

Rotary Charities' beginnings: the first forty years

Just 15 years after Rotary International's founding, the Rotary Club of Traverse City formed in 1920. True to the Rotary ethos, the Club attracted business people with a spirit of entrepreneurialism and risk-taking, a deep dedication to community, and a commitment to Rotary's "service above self" motto. When oil was discovered in 1976 on property owned by the Club's official land-holding arm, Rotary Camps and Services, the Club formed a 501(c)(3) public charity to distribute oil and gas revenue to community causes through grants.

The charitable organization now known as Rotary Charities of Traverse City began by providing capital grants for brick-and-mortar projects and later expanded to providing grants for nonprofit programs and services. In the 1990s, the organization made its first shift away from operating like a more traditional foundation when it incubated several organizations that remain an important part of the region, such as the Grand Traverse Regional Community Foundation, Homestretch Nonprofit Housing Corporation, and the Grand Traverse Regional Land Conservancy. In the mid-2000s, Rotary Charities began offering grants to strengthen the capacity of nonprofit organizations and created a capacity-building organization, NorthSky Nonprofit Network, to provide consulting, coaching, and workshops focused on organizational development and leadership.

"These decisions were our first break from a more traditional funder mindset," says Marsha Smith, who served as Rotary Charities' executive director from 1996 to 2018. "These were fairly radical roles to take on at the time." Rotary Charities has never been a large funder, typically granting about one to two million dollars annually across a five-county region. "We were always looking for ways to 'fight above our weight class,'" remembers Smith. "We wanted our dollars to work as hard as possible for the region. All of the shifts we've made have been in that spirit."

Not unlike most grantmakers, however, when it came to responding to complex community issues like homelessness or food insecurity, Rotary Charities historically provided support to programs helping the people experiencing the problem to cope with, rise above, or avoid its consequences. "We were focused more on symptoms, as opposed to root causes," says Greg Luyt, Rotary Charities' board chair. "When we identified a problem, we simply wanted to help."



Seeds of change: asking catalytic questions

In the early 2010s, several emerging patterns prompted the Rotary Charities team to question whether or not they and their grantee partners could create greater impact. They created a new learning officer position and became more intentional with their evaluation and learning practices, conducting regular needs assessments of the nonprofit landscape and stepping up their commitment to evaluating their grantmaking and learning opportunities. "We began to see more clearly that our programs and services were benefiting those they reached, and organizations receiving capacity support were getting stronger," recalls Freya Bradford, who at that time held the learning officer role. With positive outcomes at the individual and organizational levels, the question became, what was happening at the community level? Was this progress adding up to more enduring community-level change?

"Not as much as we thought," says Smith. "Our community issues weren't getting better." With the overall rates of complex problems keeping steady or worsening, the Rotary Charities team

wondered if it was a problem of scale. Upon looking more closely at the beneficiaries of funded programs and services, the team discovered a pattern. Beneficiaries largely included the people or environments already experiencing the *consequences* of a given issue. “We realized that we weren’t targeting the origins of community issues—the *causes*,” reflects Smith. Even if Rotary Charities and its grantee partners were able to reach all of the community members currently experiencing a given set of problems, soon they would be replaced with another group experiencing the same consequences. They asked, *was this the best they could do?*

The team began reflecting on how they might better support their partners, possibly through a new grant category, and how they might use their limited resources to the greatest effect. “The board and staff shared a strong desire to increase our impact,” explains Becky Ewing, who served as the organization’s executive director from 2018 to 2021. “We wanted to find different ideas that could help us raise the bar, become more impactful, and involve more people,” agrees Jeff Hickman, a current board member, who also recently served as board chair. This desire fueled the team’s drive to pursue new lines of inquiry that led them to explore a systems change approach—and that eventually became the seeds of transformative change for their grantmaking practices, mindsets, and culture.

Leveraging the trust and strong board-staff working relationships built through their earlier transitions, in 2014, the Rotary Charities team set out again to learn from emerging ideas and trends in philanthropy and changemaking. Early inspiration came from Hildy Gottlieb, founder of Creating the Future, who suggests that a first step in changing the future is changing the questions you ask. A cascade of questions became the scaffolding for the organizational transformation that they would bring about over the next four years through a commitment to ongoing adaptation.

A cascade of catalyzing questions:

- Are we satisfied with the status quo?
- What would greater transformational community impact look like? Have we contributed to it before? What did it look like?
- What conditions enable and/or inhibit transformational change in our region?
- How might we contribute to the conditions that enable transformational change?
- How do we need to change to support transformational change?

Toward learning in community: from seeking the answers to living the questions

Rotary Charities first explored these questions internally through a series of board and staff learning experiences designed with Lucille Chrisman, a long-time partner and adaptive leadership coach.¹⁴ During these sessions, the board and staff engaged in exploratory conversation and experimented with new practices like taking time to reflect, exploring their beliefs and mental models, not jumping to solutions, and getting more comfortable with uncertainty.

Change experts, including David Phillips from FSG, Paul Born from the Tamarack Institute, June Holley from the Network Weaving Institute, and later Michael Goodman and David Peter Stroh of Bridgeway Partners, were invited to work with the Rotary Charities board and staff and to facilitate learning opportunities with their wider community focused on how collaboration and networks can facilitate deeper impact on complex community issues.

Bradford recalls the team’s instinct to learn from experts in the field in the hope that they would simply provide the roadmap to achieve deeper

¹⁴ Available from: <https://www.rotarycharities.org/leadership-coaching>

community-level change. “We initially approached our desire to level up our impact as if it were a complicated problem with known best practices,” she recalls. Rotary Charities soon learned that there are few “best practices” for solving complex problems because they are the result of multiple interconnected causes that are unique to each dynamic context.

While Rotary Charities did not discover the silver bullet for changemaking they hoped for, the team ultimately found something more powerful in the advice they received from researcher, writer, and network practitioner June Holley. The Rotary Charities board and staff had invited Holley to help them develop new strategies for supporting more transformative collaborative work. Upon receiving the invitation, Holley questioned, why not invite the people who are already doing collaborative work to learn *with* you? The suggestion initiated a simple yet profound shift within Rotary Charities’ practice. Instead of going it alone, they invited local network leaders, consultants, and their staff team to come together around a table designed as a space to ask questions, probe ideas, and challenge each other’s assumptions about how change happens.

The practice of learning in community had begun, and it signaled a deeper, even more significant change for Rotary Charities. “It challenged our belief that we had to have perfectly fleshed out ideas and strategies before sharing them publicly,” reflects Bradford. “For the first time, we showed up with emerging ideas, not knowing exactly how the learning would apply or where we were headed with our change in strategy.” It marked not just a shift in intention to learn in community, but also a shift from creating something for changemakers to creating something *with* changemakers.

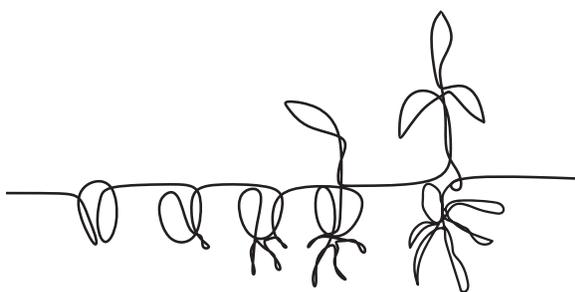
The Rotary Charities team named this new learning space the Network Sandbox and launched a small innovation fund to seed capacity building experiments for collaborative work that grew out of the group. The Sandbox lasted for the next two years, providing many lessons that were instrumental in the coming phases of Rotary Charities’ transformation.

“Why not invite the people who are already doing collaborative work to learn with you?”

— June Holley, *Network Weaver, Researcher, and Writer, Network Weaving Institute*

“Through learning with thought leaders and our broader community, we came to believe that together we have enough. Together we can make change. Learning in community is what really unlocks the magic.”

— Becky Ewing, *former Executive Director, Rotary Charities of Traverse City*



Internal change for external transformation

At the outset, the Rotary Charities team thought that the exploratory process they had set in motion was simply the beginning of another strategic shift. But the more they learned about transformative change processes, the more they realized that they were in the midst of such a process themselves. Everything they were learning about the work of shifting complex community problems also applied to them as individuals and as an organization. This meant turning inward to reflect on how their own ways of thinking and acting needed to transform—something all funders must be prepared to do in order to fully embrace a systems change approach.¹⁵ “It’s obvious to us now, but we didn’t see it initially,” shares Bradford. Ewing adds, “It doesn’t happen quickly, and it’s never done. It’s deeply personal work that is constantly evolving.”

With Chrisman’s continued support, the staff and board used individual and group reflection, journaling, and structured conversations to

¹⁵ Kania, John, et al. FSG, 2018, *The Water of Systems Change*, https://www.fsg.org/resource/water_of_systems_change.

consider how they may be unintentionally inhibiting more enduring impact on complex community issues. The team identified some problematic patterns within their strategies, including:

- Some fear of risk, failure, and experimentation
- A lack of clarity about the change Rotary Charities sought
- A focus on supporting single organizations with grants and learning opportunities, as opposed to the collaboration necessary to address large complex problems
- Demand for measurable outcomes within relatively short grant periods

Taken together, these practices contributed to competition, siloing, detrimental power dynamics, the desire for attribution, short-term thinking, lack of transparency among changemakers, and thus an unfavorable environment for the collaborative work of creating lasting change. "It was uncomfortable work. Uncertain, humbling, frustrating, yet hopeful at the same time," acknowledges Bradford.

"Once we saw with greater clarity our own role in impeding progress on the issues we sought to address, we couldn't unsee it. It started to feel like there was no turning around on this journey."

At this stage, the Rotary Charities staff and board worked with changemakers to identify internal shifts within their culture and approach that might enable more transformative change, which included living into the following intentions:

- Learn alongside those doing the work, and create bridges to external expertise
- Build relationships based on trust and transparency
- Co-create in partnership with changemakers
- Be facilitative leaders to unlock collective intelligence and creativity

- Cross traditional boundaries to engage not just nonprofit organizations, but also Native nations, units of government, businesses, capacity builders, and other funders in the work
- Be experimental and emergent, and make the path by walking it, finding comfort within uncertainty
- Be open to many possible approaches
- Stay open to failure (their own and others) as a path to valuable learning
- Support changemakers in adapting to the ever-increasing pace of change
- Be patient, and allow time for relationship building, exploration, and learning
- Make space for whole people and honor multiple ways of knowing (including head, heart, body, and spirit) ¹⁶

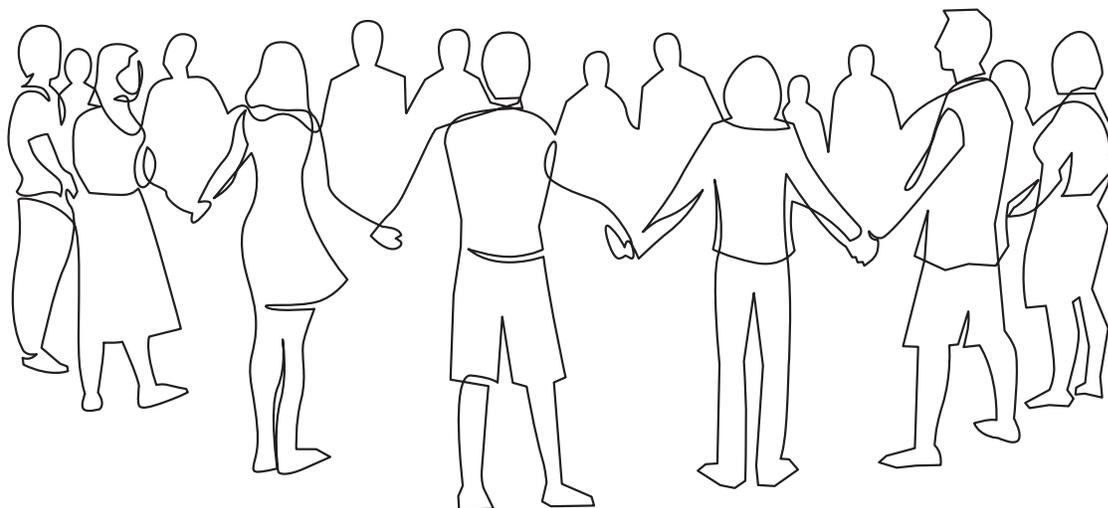
"We've learned to make room for internal adaptations, both in our mindsets and structures. We've also learned not to underestimate how deeply embedded practices can be, and how willing (or not) people might be to change them."

— Sakura Takano, CEO, Rotary Charities of Traverse City

"It takes courage to engage the questions: what needs to change, and how might we need to change? We're willing to be vulnerable with each other, and we're learning together."

— Marlene Bevan, Board Member, Rotary Charities of Traverse City

¹⁶ Perry, Elissa Sloane, and Aja Couchois. "Multiple Ways of Knowing: Expanding How We Know." Nonprofit Quarterly, 27 April, 2017. <https://nonprofitquarterly.org/multiple-ways-knowing-expanding-know>



Making an explicit commitment

In 2016, Rotary Charities faced a critical decision point: would the team commit to a new direction and take on the humbling work of confronting the unknowns it held, both for their strategy and culture? Or would they maintain the status quo with their current grantmaking and capacity building practices?

Bradford recalls how the team's desire "to make a choice, and to make it memorable" was inspired by Stroh's insight that making a choice is "a pivotal stage in the change process."¹⁷ With the tendency to revert back to past ways of working, people need the memory of an explicit decision they can bring to mind when the going gets tough. "This was a critically important moment in our journey," says Ewing.

The decision point came during the third in a series of joint board and staff convenings. Everyone stood together outside on a large deck at a retreat center, waiting with anticipation for direction from Chrisman, who facilitated the session. She described the deck as a continuum, with each end representing a different choice. People were invited to physically move to the location on the continuum

that best reflected the degree to which they agreed with either option—making their responses not just individually "felt," but also visible to the group as a whole. "We literally created muscle memory with our decision," describes Bradford. "And we've returned to it again and again."

Chrisman posed the question: "Should Rotary Charities continue its work as a traditional charity, or commit itself to working systemically as a catalyst for transformative change?" The question landed, and after a brief pause, everyone crowded toward the north end of the deck, unanimous in their strong desire to make a shift. "In that moment," Hickman recalls, "it became clear that we collectively wanted to pursue a more meaningful and impactful approach."

With clarity established, the next question became: "How prepared do you feel to make this shift?" Again, a brief pause before movement revealed a new pattern—and less consensus. The board members shuffled but most remained on the north end of the deck, indicating their readiness for change. The staff, on the other hand, clustered at the south end, showing concern about their readiness for change. Given that they were deep

¹⁷ Stroh, David Peter. *Systems Thinking for Social Change: A Practical Guide to Solving Complex Problems, Avoiding Unintended Consequences, and Achieving Lasting Results*, Chelsea Green Publishing, White River Junction, VT, 2015, p. 145.

into learning about what would be required to make the shift with integrity, Ewing acknowledges, “We probably had a greater sense of the radical nature of the work we were about to undertake.” Bradford adds, “Committing to a systems approach meant redesigning so much, from how we deployed resources to our partnership with grantees, and from our evaluation practices to our role within the region.”

“If you’re going to commit to transformative change, you have to jump in with both feet. It’s a big shift and requires a lot of learning. There really is no way to do it halfway. It takes a lot of effort, but in my mind, it’s worthwhile if you can do it. The path we’re on now feels much more inspiring and significantly more rewarding.”

— Greg Luyt, Board Chair, Rotary Charities of Traverse City

What’s needed: working together differently, and working on different things

With an explicit commitment established, in 2017 the Rotary Charities team took several actions that deepened their listening and learning and propelled their transformation.

The Rotary Charities team distributed a survey to changemakers across the region to collect their perspectives on emerging ideas related to transformational change. Over 600 people completed the survey, providing encouraging feedback and helpful insights. Overall, 94% of respondents felt it was urgent or important to work collectively to make progress on the region’s most complex problems, while 75% agreed that doing so would require them to work differently, adopting practices like:

- Collaborating with people working on the same issues, people from other sectors, and people affected by the issues at hand
- Taking time to consider the root causes of issues before taking action
- Advocating for policies to improve the region

- Changing their mindsets and ways of relating to others
- Experimenting with new practices
- Learning along the way

Changemakers were asked to share the extent to which they were already using these practices, and their responses revealed room for improvement. Most significantly, few changemakers reported that they were already collaborating with those affected by community problems, or advocating for policies to improve the region. The largest barrier to collaborative work related to funding: a lack of funding for collaborative work itself, a lack of funding for “backbone” support for networks, and turfism or competition between organizations for limited resources.

When invited to share through open-ended responses how they believed funders could better support collaborative action, several ideas rose to the top. Respondents suggested that funders could:

- Incentivize or reward collaboration
- Fund different things, like backbone support for networks, learning and technical assistance, experimentation, or general operations for organizations
- Convene partners around issue areas
- Help people connect to existing initiatives
- Collaborate with other funders

“We need to do a better job of using existing resources and stop reinventing the wheel. I often see collaborative efforts spending time and resources collecting data and developing programs that already exist.”

— Anonymous response to the changemaker survey

“We can all approach the same problem from different angles. Collectively, working together, we can make a great impact if we work on mutually reinforcing tasks.”

— Anonymous response to the changemaker survey

Later in 2017, Bradford joined a community of practice for funders using systems change approaches hosted by Grantmakers for Effective Organizations. Through a community of practice connection, Rotary Charities met Amy Dean, a consultant from Change Elemental (then Management Assistance Group), and contracted her to help the staff and board further clarify their new direction by creating a theory of change. Dean ran two focus groups with changemakers and regional consultants, conducted interviews with key leaders, and pointed staff to organizations like the Garfield Foundation, McConnell Foundation, and the Bush Foundation for peer interviews.

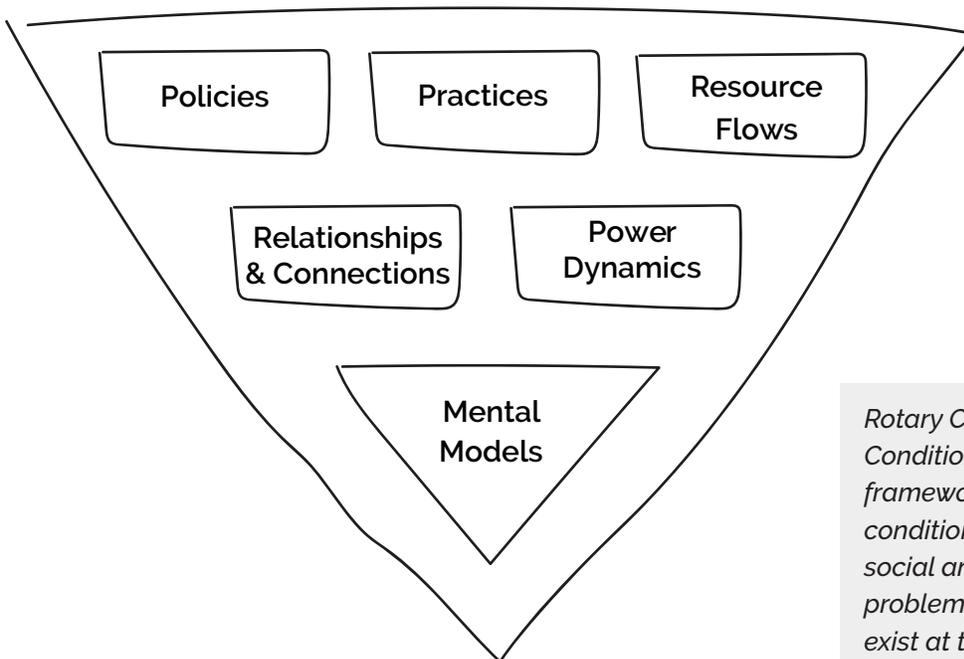
Through these activities, several themes emerged. Rotary Charities learned that solving the issues affecting the region wasn't actually the mission of most organizations, despite the shared desire among changemakers to do so. With most organizations focused on the symptoms of issues, their underlying causes seemed a case of everyone's problem and no one's responsibility. So the Rotary Charities team began asking more pointedly, given what they had learned about different approaches to changemaking, what would it take to put deep and lasting transformation in motion? They found that addressing root causes would require two fundamental changes within their collective work, which could be boiled down into the following:

- **Working together differently** – What was needed were different collaborative practices to support genuine connection among diverse changemakers, mutual learning, innovation, adaptive strategy, and aligned action across sectors and issue areas. Working together in this way would require everyone to be open to examining their assumptions and changing their beliefs, to look beyond surface-level symptoms, to build trust with unlikely partners, to prioritize equity, and to summon their patience for the long-term work of shifting complex systems.

- **Working on different things** – In addition to working together differently, there was a need to shift the community's collective focus to different targets. Most work in the social sector aims to support the people (or environments) experiencing a problem in transcending its consequences. While this focus is vital, as long as we have systems that are not working for everyone, it does not resolve the problem itself. "With fairness in our vision, we're obligated to address equity and justice," asserts Ewing. "We learned that an equity approach calls on us to address the systemic factors holding complex problems in place so those who bear the greatest burdens from these problems have a fair shot to thrive." What was needed was a collective focus on the six interdependent conditions that typically hold problems in place—policies, practices, resource flows, relationships and connections, power dynamics, and mental models—depicted in the framework on page 21.

The Rotary Charities team took advantage of the momentum they gained from the added clarity and launched two more critical experiments. First, they created a temporary Transformation Fund to provide grants to initiatives working collaboratively to target the root causes of complex issues. "It was an intentionally flexible pool of resources for experimentation," describes Sakura Takano, Rotary Charities' current CEO. Staff worked closely with these grantee partners at every step of the process, from application to evaluation, so they could maximize their own learning and be responsive to challenges—an approach they still use today. The Fund provided support for four initiatives and offered valuable lessons for funder-grantee partnerships, including how to both fund and participate in the work, and how to maintain flexibility and support adaptation.

The Six Conditions of Systems Change Framework¹⁸



Rotary Charities adopted the Six Conditions of Systems Change framework that depicts the conditions that hold complex social and environmental problems in place. The conditions exist at three separate levels of visibility, from the explicit to the implicit: structural, relational, and transformative.

During this time, the Rotary Charities staff also leveraged a free online Systems Practice course offered through Acumen Academy.¹⁹ Again, they used the course as an opportunity to learn alongside those in the community who were also interested in a new approach to changemaking. Nineteen teams from the region have completed the course since 2017, many of which have gone on to receive support from Rotary Charities' new grants and services focused on systems change.

These shared learning opportunities helped establish not only a common language for talking about systems change, but also trusting relationships among changemakers, consultants,

and Rotary Charities staff alike, laying the foundation for a representative team to co-design Rotary Charities new offerings. One participant, Fred Sitkins, who is the executive director of Inland Seas Education Association, reflects, "The collaboration modeled throughout this work has set the example for what's possible when we work together to create a thriving community."

A bold new direction: accelerating systems change

In July 2018, Rotary Charities formalized its commitment to a bold new direction with the launch

¹⁸ Kania, John, et al. FSG, 2018, *The Water of Systems Change*, https://www.fsg.org/resource/water_of_systems_change.

¹⁹ Available from: <https://acumenacademy.org/course/systems-practice>

of new grant categories, learning offerings, and communications tools, along with an updated vision, mission, and set of guiding principles for Rotary Charities itself—all of which were informed by the exploratory work that unfolded over the preceding years.

Launching new offerings required the Rotary Charities team to confront the challenge of discontinuing some preexisting grant categories and learning programs, which led to some mixed feelings from the team and changemakers in the community. "I was working for another nonprofit at this time," recalls Takano, "and I remember worrying that the funding and learning I appreciated so much was coming to an end. Yet there was also excitement about support for something new."

To make room for this new direction, the team had to let go of some existing grants and programs. They discontinued grants and services focused on organizational capacity building, rebranded the capacity building previously offered through NorthSky under Rotary Charities' name, and refocused on services that would support organizations in working together more effectively. They retained much of Rotary Charities' legacy grantmaking through a new grant category called Assets for Thriving Communities,²⁰ designed to support brick-and-mortar projects and programs. They also raised the ceiling of the highly successful grant category called Seed Grants²¹ that supports the early stages of project development, and expanded their scope to include support for collaborative initiatives in the early phases of systems change. These grants can now be used to convene diverse stakeholders, for example, or to explore the root causes of complex problems to find new leverage points for change. Finally, the team also launched a new Systems Change Accelerator²² grant category designed to fund initiatives made

up of at least three organizations taking a systemic approach to addressing any complex community issue. With all of these offerings, Rotary Charities reaffirmed its commitment to being a broad-based funder, open to requests that meet their guiding principles and that can help create adaptive and thriving communities.

Six new guiding principles were developed that now inform everything from how the team selects grant applications for funding to the development of new learning opportunities. Understanding how important these principles are not just for systems change, but also for their organization, the team is currently in the process of incorporating the guiding principles in Rotary Charities' evaluation plan. The principles assert the organization's new theory of change—the belief that advancing inclusive, collaborative, resourceful, reflective, adaptive, and aligned ways of working will increase the likelihood that we can collectively create community assets and systems that allow all to thrive.²³

To date, Rotary Charities has invested nearly \$2.1 million in 20 initiatives taking a collaborative systems change approach to a complex community problem.²⁴ Grantee partners allocate funding across multiple organizations to support regular convening and learning among partners; conduct assessments, learning, and mapping exercises to find new leverage points within their system; design and implement strategies to change their systems; and improve their learning, communication and storytelling.

In addition to funding, grantee partners are eligible to join the Systems Change Community of Practice, a facilitated space where people engage in peer learning around systems-based approaches with other past and current Systems Change Accelerator grantees. Grantee partners are also eligible to

²⁰ Available from: <https://www.rotarycharities.org/assets-for-thriving-communities>

²¹ Available from: <https://www.rotarycharities.org/seed-grants>

²² Available from: <https://www.rotarycharities.org/systems-change-accelerator>

²³ Available from: <https://www.rotarycharities.org/about-us/our-work>

²⁴ Available from: <https://www.rotarycharities.org/our-grantees>

receive 10 hours of Systems Change Coaching²⁵ at no cost for additional external support from seasoned systems change practitioners. The additional support offered alongside grant funds has been vital. Through the Community of Practice and Systems Change Coaching, initiatives and Rotary Charities staff are actively engaged in building skills, capacities, and mindsets around challenges they surface, including:

- Network convening, leadership, and governance
- Communications and storytelling
- Equity and inclusion
- Evaluation and learning
- Facilitation and working with group dynamics
- Collaborative fund development
- Systems leadership and wellbeing

The Rotary Charities team values these learning opportunities as a chance to deepen their relationships with grantee partners and follow the initiatives' efforts as they unfold.

"It's a rare and beautiful thing for philanthropy to invite changemakers to change their minds about how they see the world and problem-solve. Rotary Charities has embraced this philanthropic mindset by daring to live and breathe systems thinking into problem-solving. It really does take a village, and I'm grateful to be part of this urgent work."

— Liz Kirkwood, Executive Director, FLOW

Celebrating early signals of change

Several years after making the explicit commitment to transform from a traditional charity into a catalyst for transformative change, Rotary Charities acknowledges that the path has been (and still is) challenging. "It has required letting go, and, at the same time, being open to what may come. Change includes a grieving process," says Takano. A balance of humility and patience, perseverance and adaptability, and grieving and openness to

new ways of working together has supported their process. Despite the challenge, some have been rewarded with a greater sense of involvement in the work of changemaking. Homer Nye, a longtime board member, reflects, "I feel we're much more involved in actually making a difference in our community."

Thanks to the numerous organizations and individuals who are walking the path with Rotary Charities, today the organization and its wider community are working together differently and working on different things. Their evaluation and learning practices have helped them spot early signals of change within regional systems change initiatives, including:

- Increases in the number and diversity of people and organizations working in collaboration
- Greater alignment around shared purposes, goals, and roles
- Inclusion of diverse perspectives, including those with lived experience
- Improved information and resource flows across systems
- Improved ability among changemakers to connect to and leverage resources from outside their respective systems
- More co-creation and experimentation
- Improved ability to learn and reflect with others in the system
- Mindset shifts among changemakers

Some initiatives are also reporting positive shifts in the complex problems they are addressing across the region, including reductions in the frequency of youth homelessness, sharp increases in the accessibility of healthy food through the emergency food system, and fewer barriers to health and health equity. These shifts, among others, are the result of changemakers' perseverance in creating the conditions for individual, relational, and structural systemic change. Takano suggests that these shifts also

²⁵ Available from: <https://www.rotarycharities.org/systems-change-coaching>

"satisfy our human desire for measurable change." She goes on, "Systems change initiatives across our region are on the path to achieving their goals. Based on the early evidence of the promise of this approach, we invite others to join us in setting the stage for lasting change on our community's toughest issues."

Rotary Charities' new guiding principles include:

- **Inclusive** - *nothing about me without me*
- **Collaborative** - *do what you do best, connect for the rest*
- **Resourceful** - *make the most out of what the community has*
- **Reflective** - *learn from looking out, around, and in*
- **Adaptive** - *take action on what you learn*
- **Aligned** - *see and situate your work in relation to others*

Finally, building on their efforts over the last decades, the Rotary Charities team aims to deepen and expand their partnerships with other funders, consultants, and coaches to strengthen the ecosystem of support for changemakers taking a systems change approach in Northwest Lower Michigan. "We are thrilled to see more and more funders interested in this approach to changemaking, along with a growing network of consultants and coaches trained in systems practices," says Takano. "We are always looking for more ways to connect and align with others. It's our practice to 'do what we do best and connect for the rest' so that, together, we can improve the region for everyone."

For more information on this story, please contact Freya Bradford at fbradford@rotarycharities.org.

Looking Ahead

Today, Rotary Charities remains committed to adapting along with the communities it serves. The team continues to explore how their guiding principles established in 2018 can strengthen the organization by asking questions about how to become even more inclusive, aligned, and resourceful in their activities. Along these lines, the team is currently re-envisioning how they will invite and integrate more diverse perspectives as they continue evolving their policies and practices. Additionally, they are in the final stages of refreshing their evaluation plan to include new methods for assessing their alignment with the guiding principles. The plan will also support them in incorporating more systemic evaluation practices, such as ripple effects mapping, to accelerate their learning with systems change grantee partners.

A Story of Change:



Ending Youth Homelessness in Northwest Michigan

“Most young people go to school and worry about things like prom. I thought about homelessness and foster care and making it through high school. My goal was always to support other people in doing better than I did in those systems. If I’ve done that, then I’ve done what I need to do to make the world a better place.”

— David Van Horn, former Youth Action Board Chair, Northwest Michigan Coalition to End Homelessness

“I remember one youth listening session where a 15-year-old woman recalled wondering when she was in elementary school, ‘Why are other kids playing at recess? Aren’t they all living out of a car like me?’ Hearing her story was the turning point in my emotional connection to the work. I’m fully committed.”

— Ashley Halladay-Schmandt, Director, Northwest Michigan Coalition to End Homelessness

Introduction

Since 2016, the Northwest Michigan Coalition to End Homelessness (NWCEH) has been working to prevent and end the persistent challenge of youth/young adult homelessness through a coordinated community approach. More than 18 organizations and agencies from across five counties in Northwest Michigan have united behind the shared vision of a community where every youth/young adult has safe, appropriate, and permanent housing.

To advance their audacious goals, NWCEH members have drawn on system change practices to expand their understanding of the system at the heart of their work, to strengthen the connectivity between youth-serving systems, and to create an equitable and resilient homeless response system specifically for youth/young adults—a community asset that has never existed before. Centering the voices and leadership of youth/young adults with lived experience has been paramount to the work, as has the commitment of everyone involved to the values of collaboration, accountability, and data-driven decision-making.

This story of change shares how NWCEH members and their partners are working together in new ways to bring an end to youth/young adult homelessness and to interrupt the cycle of chronic homelessness that begins for many at an early age. A story of systems change, it is organized into four phases of development that support multi-stakeholder initiatives in advancing enduring change.

About the Northwest Michigan Coalition to End Homelessness

The NWCEH (formerly the Northwest Michigan Continuum of Care) seeks to make homelessness rare, brief, and one-time across Northwest Michigan. NWCEH members address housing issues through a community-based process that develops a comprehensive, coordinated continuum

of care for individuals and families who are at risk of and/or currently experiencing housing instability.²⁶ Since 2006, over 18 local organizations and agencies and numerous volunteers who belong to the Coalition have been working to meet the needs of homeless youth/young adults. Their efforts represent the single initiative in the region committed to ending youth homelessness.



The Northwest Michigan Coalition to End Homelessness serves youth/young adults in Antrim, Benzie, Grand Traverse, Leelanau, and Kalkaska Counties in Northwest Michigan.

The persistent challenge of youth homelessness

Though often invisible to the public, homelessness is an extensive and persistent problem for youth/young adults in Northwest Michigan. “We’ve learned through our youth who experience homelessness that being alone and on the street is often the safer option than staying home,” says Ashley Halladay-Schmandt, who serves as the NWCEH director. For many, especially those in rural areas, homelessness might look like couch surfing, doubling up in someone else’s space, or staying in abandoned buildings—circumstances that are constantly subject to change.

Given this, youth homelessness is distinctly challenging to quantify. Yet thanks to three years of data drives and extensive outreach efforts, reliable data in 2019 reported that 154 youth/young adults between the ages of 18 and 24, along with 40 unaccompanied youth under the age of 18, experienced homelessness across the counties served by the NWCEH that year. These totals represent the number of youth/young adults who

²⁶ Available from: <https://www.endhomelessnessmi.org>

engaged with the homeless response system by, for example, reaching out to a service provider for support in ending their homelessness experience. They do not represent a consistent year-round experience of homelessness.

To end youth homelessness, a community must achieve and maintain what's called "functional zero" youth/young adult homelessness, a scenario in which a greater number of youth/young adults are exiting homelessness than entering it.



The NWCEH uses the definition of homelessness from the U.S. Department of Housing and Urban Development: "literally homeless" is a condition in which an individual or family lacks a fixed, regular, and adequate nighttime residence.²⁷

Focusing the lens on youth homelessness

Were it not for NWCEH's concerted efforts toward the goal of ending all homelessness in the early 2010s, Halladay-Schmandt acknowledges that the lens would not have focused on youth/young adult homelessness. Over five years, NWCEH partners leveraged their limited resources to overhaul the adult homeless response system, expanding their focus from housing those who are easiest to engage and serve to include housing those who are most challenging to serve. Shelter diversion practices, housing navigation, rent subsidies, and continual case management, in addition to other structural changes inside the system, have resulted in permanently housing greater numbers of those experiencing chronic homelessness across the region.

With the system more effectively serving adults by 2016, NWCEH was poised to look more carefully at the homelessness experience of other groups. To the delight of advocates who had consistently pressed the Coalition to consider the needs of youth/young adults inside an adult-serving system,

the question became, how was the system serving youth? In order to achieve the goal of ending all homelessness, NWCEH members shared a growing recognition of the need to shift their attention to youth/young adults who are at risk of experiencing chronic homelessness in the future.

Phase 1 - Convene Stakeholders and Commit to a Shared Purpose



Convene diverse stakeholders to explore how they might work together to address the source of a complex problem and define a shared purpose for their collaboration.

Assessing the need to identify missing perspectives

Unlike many systems change initiatives, the NWCEH already had the committed participation of a group of organizations, agencies, and volunteers when it began its systems change effort in earnest. Yet it lacked clarity about whether or not its current membership included all of the stakeholder perspectives from across the service system required to better serve youth/young adults experiencing housing instability. What was needed was a clearer picture of the youth homelessness experience across Northwest Michigan in order to identify missing perspectives and to begin honing in on a shared purpose that would guide the Coalition's collaboration.

The NWCEH applied for and received a small grant from Rotary Charities in 2016 to conduct a Youth Needs Assessment²⁸ that would offer such a picture of youth/young adult homelessness. Thirty-six youth/young adults at risk of and/or currently experiencing housing instability participated in focus groups, and 120 completed an online survey. The results offered invaluable insights into the reasons why youth/young adults experience homelessness and where they turn for support and

²⁷ *Criteria and Recordkeeping Requirements for Definition of Homelessness*, US Department of Housing and Urban Development, Jan. 2012, <https://www.hudexchange.info/resource/1974/criteria-and-recordkeeping-requirements-for-definition-of-homeless>.

²⁸ *Youth Homelessness Demonstration Project*, Northwest Michigan Continuum of Care, 2016, <https://static1.squarespace.com/static/5ed01d42ee67267f4f242c48/t/636269f99e9b6a468bd2f75d/1667394061482/A+youth+needs+assessment.pdf>.

shelter when they leave home. "The assessment helped me see that there was very little available for young people who are homeless in our system," recalls Halladay-Schmandt.

Centering the voices of youth/young adults

While the assessment began to shine a light on gaps within the service system, it also emphasized the critical importance of centering the voices of youth/young adults with lived experience in equitably transforming it. In response, the NWCEH worked to establish a Youth Action Board (YAB) in 2017 by recruiting those who had participated in the Youth Needs Assessment focus groups. David Van Horn was among the first to receive an invitation and describes the opportunity as a "natural fit" after having traveled around the U.S. advocating for foster care. Ari Elaine, another early invitee, hoped to dramatically change the Coalition's level of accountability to youth through their participation: "I joined because I didn't think youth voices were heard. I wanted to offer mine."

Van Horn and Elaine partnered in the effort to recruit others under the age of 25 to join the YAB and share their experiences with homelessness. "It took time," recalls Van Horn. "We sat at bookstores and other community hubs. Eventually, we were ten people strong." Meetings were held bimonthly at six o'clock over pizza and followed a set of agreements designed to create the conditions for safety and trust. Adults could not outnumber youth/young adults, for example, and every decision made by the NWCEH required involvement and final approval from the YAB to ensure that services for youth/young adults are developed with their guidance.

Challenges arose during Van Horn's tenure as YAB Chair, including how to compensate youth/young adults for their time, waning participation, and, consequently, decision points when Van Horn was the only YAB member present. "I didn't want to be the only young person giving input on NWCEH decisions, but we couldn't make other people show up." Even so, Van Horn reflects very positively

on his time with the YAB and the Coalition: "I really appreciate having been involved from the very beginning of the Coalition's focus on youth homelessness. Those experiences were some of the best of my life."

Leveraging Rotary Charities' grants to secure federal funding

While the YAB was taking shape, in early 2017 the U.S. Department of Housing and Urban Development (HUD) announced the availability of \$33 million for competitive federal grants. Funding would be awarded to 10 communities for piloting innovative solutions to prevent and end youth homelessness. Keen on the opportunity, the NWCEH sought an additional grant from Rotary Charities to complete the rigorous HUD application with the participation and approval of the YAB. "Those were *the longest days*," Van Horn chuckles, admitting that the time investment was worth the effort. Later that year, the NWCEH was awarded \$685,000 in renewable funding from HUD for a Youth Homelessness Demonstration Project (YHDP) with the goal of developing a youth homeless response system.

Taking a systems approach itself, HUD required the participation of numerous regional agencies with systemically different approaches to youth/young adult homeless prevention. "We sometimes had representation from 15 agencies at the table. That's huge for the size of our community," explains Halladay-Schmandt, acknowledging how helpful the HUD requirement was for expanding the voices around the table, including some who had never worked on homelessness before. "We couldn't have reached such a high level of collaboration without the initial support of Rotary Charities," adds Tina Allen, who served as coordinator of the Northwest Michigan Continuum of Care when the federal funding was awarded.

Committing to a shared purpose

Through the initial phase of the YHDP development, an intentional community response capable of leveraging expertise and support from outside

the homeless service sector began to develop. Even more important, NWCEH members cohered around an initial shared purpose to create lasting solutions for youth/young adults at risk of and/or currently experiencing housing instability through coordinated community supports to prevent and end youth homelessness.

The Northwest Michigan Coalition to End Homelessness members who were involved in the early implementation of the Youth Homelessness Demonstration Project include the Northwest Michigan Community Action Agency, Goodwill Northern Michigan, Traverse City Area Public Schools, Third Level at Child & Family Services of Northwestern Michigan, Greater Grand Traverse Area Continuum of Care, Michigan Department of Health and Human Services, Grand Traverse County Health Department, Grand Traverse Band of Ottawa and Chippewa Indians, Northwestern Michigan College, Traverse Area District Library, and Traverse City Police Department, in addition to numerous volunteers and social work interns.

"Systems change requires a group of community partners coming together in recognition that the problem doesn't belong to any one person or agency. Youth homelessness is an issue that affects us all and, more importantly, the youth and families we want to serve. Building relationships is key to making sure our services are connected so we can tackle the issue together."

— Maureen Clore, Director, Michigan Department of Health and Human Services for Antrim, Charlevoix, and Emmet Counties.

Phase 2 - Explore the Problem and Find Opportunities for Leverage



Explore the upstream causes of the complex problem to develop a shared understanding of the system and to identify promising opportunities for targeted intervention.

Mapping the system for shared understanding

To complement the Youth Needs Assessment, several NWCEH members set out to develop a systems map²⁹ showing the factors that contribute to youth homelessness in the region. Rotary Charities had pointed the group to a free Systems Practice course offered through the Acumen Academy³⁰ to produce the initial map with support from a consultant. A second map was later developed for the YHDP depicting the current pathways available to youth/young adults through the homeless response system toward stable housing. Both showed the services of multiple agencies (foster care, host homes, rental assistance, and more) overlaid upon one another, revealing points of connectivity, gaps, and inefficiencies in the current homeless response system.

People in this field often refer to the homeless response system, which is a clear set of programs, services, and professionals who support individuals in ending their homelessness experience. Through the mapping process, NWCEH members found that the system at the heart of their work to prevent and end youth/young adult homelessness is far broader and more deeply interconnected. The system that the NWCEH strives to transform includes both the explicit services and programs and agencies that deliver them, as well as the implicit ways the community responds to youth/young adults who face housing instability. NWCEH members came to understand that focusing on making changes to the homeless response system alone will not end youth/young adult homelessness. What's also needed is a profound cultural shift in the way people understand, respect, and equitably empower youth/young adults with lived experience.

"For us, there is a significant difference between the homeless response system and the 'systems work' we were embarking on."

— Tina Allen, former Coordinator, Northwest Michigan Continuum of Care

²⁹ Homeless Youth Systems Map. Northwest Michigan Coalition to End Youth Homelessness, <https://docs.google.com/presentation/d/1Tr51UKL5lFHdVVFWVXo4EvM8sO63xOBg/edit?usp=sharing&ouid=118429953639021354106&rtopof=true&sd=true>.

³⁰ Available from: <https://acumenacademy.org/course/systems-practice>

Building a Community Plan on evidence-based principles

Producing a systems map is sometimes enough for a systems change initiative to identify places where targeted intervention might produce out-sized impacts throughout a system. In the case of the YHDP, the process of designing an action plan for effecting lasting change helped NWCEH members more clearly articulate the system's boundaries, deepen their understanding of the upstream causes of youth/young adult homelessness, and identify opportunities for leverage.

Following the HUD award, Rotary Charities supported NWCEH members with another small grant to write The Northwest Michigan Plan to End Youth Homelessness³¹ (Community Plan for short), an inclusive and coordinated plan documenting different ways of working together to prevent and end youth homelessness. Coalition members collaboratively developed the plan over the course of a year and a half with extensive technical assistance from HUD, mutual learning with the nine other communities awarded HUD funding, and a priority on youth/young adult leadership through the YAB.

The NWCEH learned that transformation at scale would require partnering with other youth-serving systems, including the education, juvenile justice, behavioral health, and child welfare systems. The challenge was coming to agreement on what it would look like to operationalize the work across them. "It was my job to ask leaders inside other systems, 'How can we partner to make change happen?'" says Allen. She goes on, "This way of working isn't natural. People usually want to do their own job and do it really well. They might need support from someone else, but only every once in a while. We had to give people reasons to join our table."

Through hundreds of conversations—different in nature than what was normally possible—and constant learning, what resulted was a flexible Community Plan informed by youth/young adults and built on evidence-based principles shared by other communities across the country.

Opportunities for leverage

The Community Plan identified opportunities for leverage that would have the greatest potential to impact the issue of youth homelessness at three levels of the system: structural, relational, and transformational.³²

Structural change (policies, practices, and resource flows) – Leverage opportunities included:

- Addressing the gaps and inefficiencies uncovered within the current homeless response system, with a focus on shelter diversion, housing navigation, and continual case management for youth/young adults
- Building new exit strategies for youth/young adults out of homelessness
- Building bridges between youth-serving systems

Relational change (relationships, connections, and power dynamics) – Leverage opportunities included:

- Supporting youth/young adults in increasing their engagement in lasting positive relationships
- Empowering youth/young adults to have authority over their own lives
- Transforming the youth homeless response system's inequitable leadership models to share power with youth/young adults

³¹ *The Northwest Michigan Plan to End Youth Homelessness: Executive Summary*, Northwest Michigan Continuum of Care, July 2017, https://static1.squarespace.com/static/5ed01d42ee67267f4f242c48/t/635febb5ffc942003b551d57/1667230652657/NorthwestMIYouthPlan_Executive+Summary.pdf.

³² Kania, John, et al. FSG, 2018, *The Water of Systems Change*, https://www.fsg.org/resource/water_of_systems_change.

Transformational change (mental models) –
Leverage opportunities included:

- Changing hearts and minds about youth/young adults, especially those who have experienced homelessness, and about what it will take to prevent and end youth homelessness in Northwest Michigan



“Nothing about youth without youth” has become a guiding principle for the Northwest Michigan Coalition to End Homelessness and its efforts to prevent and end youth/young adult homelessness.

Across all three levels, the NWCEH saw opportunities for leverage not just externally in the world “out there,” but also internally within the Coalition’s way of being and doing. Both are part of the system at the heart of their work. “We know that unless we are willing to see how we are part of the problem, we will never have the impact we desire,” grants Halladay-Schmandt.

Phase 3 - Design and Carry Out a Constellation of Actions



Design and carry out a systems-change strategy sequencing the actions necessary for creating out-sized impacts throughout the whole system.

By 2018, the NWCEH was equipped with the Community Plan and a strategy that members believed to be capable of effecting transformative change for the issue of youth/young adult homelessness through targeted intervention. Rotary Charities supported the Coalition with two additional grants (one in 2018 and a second in 2020), leveraging more than \$1.3 million in cash matches from HUD, the Michigan State Housing Authority, the Michigan Department of Health and Human Services, Goodwill Northern Michigan, and the Northwest Michigan Community Action Agency to carry out the work.

Using these supports, the NWCEH seeks to create the conditions for systems change not just at the systemic level, but also at the personal and interpersonal levels in their way of being and doing as a group of individuals, agencies, and organizations.

A constellation of mutually-reinforcing actions

Using the Community Plan as a guide and shared infrastructure for support, NWCEH members are working diligently to carry out a constellation of mutually-reinforcing actions, some of which are highlighted below. They are confronting the challenges of systems change work head-on—in some cases giving up funding and stopping “successful” programs that have led to unintended consequences—and adapting strategy in response to changing contexts, such as those brought about by the COVID-19 pandemic.

Structural change (policies, practices, and resource flows)

Hosting regular youth listening sessions: The NWCEH discovers what systems-level changes are needed by listening carefully to youth/young adults with lived experience—and staying accountable to their suggestions. Over the years, the Coalition has hosted numerous youth listening sessions, where YAB members offer input to providers on how to tailor their services for youth/young adults. These sessions use an intentional format, sometimes referred to as a fishbowl, that gives youth/young adults the floor, so to speak, to share their reflections while adults simply listen. A set of open-ended questions about the system (e.g., How did you come into homelessness?) are usually teed up by a facilitator first, followed by a set of questions related to the service system (e.g., What’s your experience of the shelter?).

“It was important to create a space where participants felt valued for what they had to say,” Van Horn emphasizes. “Because we were valued.

We were influencing and approving programs." Perhaps not all youth/young adults felt the same all of the time. Elaine remembers "feedback from other YAB members feeling a lack of trust toward adult partners and the system." Halladay-Schmant recognizes that for most YAB participants, it would be challenging to feel otherwise, given their life experiences. Even so, she says NWCEH members do their best to live up to their accountability commitment: "We try to do absolutely everything youth tell us they need related to homeless services."

"Before attending youth listening sessions, I would clear my mind, literally saying to myself, 'I know nothing,' in an attempt to leave my own assumptions about the system behind."

— Tina Allen, former Coordinator, Northwest Michigan Continuum of Care

Building bridges between youth-serving systems:

In 2019, the NWCEH conducted listening sessions to explore the issue of youth/young adults "aging out" of foster care into homelessness. Maureen Clore, who serves as a director with the Michigan Department of Health and Human Services for Antrim, Charlevoix, and Emmet Counties, reflects, "My child welfare team came together with staff from Community Mental Health Services, homeless shelters, and other members of the NWCEH to discuss real-world examples when we collectively missed the mark for youth navigating between our systems. The stories were eye-opening for everyone." The group explored where and why gaps in care existed and designed actionable interventions, including a new Community System Liaison role for the Coalition.

Creating a Community System Liaison role:

"Since the youth homeless response system is so complicated, we needed a 'living index,' if you will, to make it more accessible to youth," says Tara DeGroot, who serves in the newly created Community System Liaison role housed at Goodwill Northern Michigan. DeGroot also works with

providers across other youth-serving systems to increase their collaboration and ultimately improve how their services are delivered to youth/young adults experiencing homelessness.

Building exit strategies out of homelessness:

Unless the service system builds and aligns around opportunities for permanent housing for youth/young adults, youth homelessness will not end. Thanks to an impact investment and capital grant from Rotary Charities, the NWCEH partnered with the Traverse City Housing Commission and Michigan Community Capital on the development of East Bay Flats,³³ a workforce housing community. Fourteen units are now dedicated for formerly homeless youth/young adults.

"There was a long period when it felt like just a lot of talk about the things we were going to do. That feeling changed when the East Bay Flats were purchased to house formerly homeless youth."

— David Van Horn, former Youth Action Board Chair, Northwest Michigan Coalition to End Homelessness

Relational change (relationships, connections, and power dynamics)

Sharing power with youth/young adults: Creating a more equitable system requires involving those who are most affected by decisions not just in making them, but also in accountability spaces. Youth/young adults are empowered to be equal partners at the NWCEH table, contributing their perspectives on everything from creating goals to evaluating actions for the YHDP.

Using a charter to acknowledge lived experience as expertise:

The NWCEH created a charter for members to sign both in agreement that "lived experience is expertise," and as a signal of their commitment to dismantling inequitable power structures that stifle the voices of youth/young adults. Acting on the commitment—by, for example, making organizational changes based on feedback from youth/young adults—has not been easy for all

³³ Available from: <https://michigancommunitycapital.org/projects-detail/?propid=28>

organizations. "We knew we would need to support providers across the youth homeless response system in listening to young people more deeply, empowering them to be the experts of their own experiences, and ultimately sharing power with them," says Halladay-Schmandt. The NWCEH's backbone staff invests significant time and energy in relationship building and education to strengthen members' accountability to their commitment.

"I continue to learn from people with lived experience about how to more effectively involve them in the work in a way that's not exploitative."

— Ashley Halladay-Schmandt, *Director, Northwest Michigan Coalition to End Homelessness*

Transformational change (mental models)

Including youth/young adults in public-facing meetings: "Whenever we speak in public, we include youth partners—not to share their trauma history, but to speak about the work," says Halladay-Schmandt. With permission, NWCEH members bring recordings of youth/young adults sharing their perspectives when their involvement isn't possible. Based on the experience of numerous public meetings, Coalition members believe mindsets about youth/young adults who face housing instability begin to shift when adults take the opportunity to truly listen to the perspective of youth/young adults with lived experience.

Creating the conditions for changing hearts and minds: Engaging youth as key stakeholders has "forever changed many of us," reflects Halladay-Schmandt. Following the guiding principle "nothing about youth without youth" and empowering youth/young people to be equal partners in the work are creating the conditions for changing hearts and minds throughout the system in focus and within the broader community.

A change in context tests the system's resiliency

By 2020, most of the work described here was underway. NWCEH members were collectively building a more equitable and effective youth homeless response system and planting seeds for an even larger systems transformation around the issue of youth homelessness in Northwest Michigan.

And then the COVID-19 pandemic hit.

COVID-19 sent a shockwave through the system of youth homelessness, impacting the essential points of connectivity within the youth homeless response system and straining the Coalition's ability to advance its agenda. Degroot reflects, "COVID-19 did significant damage to the relationships between youth and social workers and school counselors across the region, especially with the transition to 'remote everything.'" It is exactly these relationships that rural communities like those in Northwest Michigan rely on to quantify youth homelessness and support youth/young adults in navigating the service system. "It was really hard," agrees Clore, noting that there weren't many youth/young adults moving in or out of the foster care system, a stagnancy that was far from normal.

Thankfully, the high level of collaboration and systems practice that defined the NWCEH's efforts over the preceding years strengthened the resiliency of the youth homeless response system and positioned the Coalition to recover lost ground. "Tara's role as Community System Liaison is so important now with the world opening up," Clore offers as an example. "She's supporting us in reestablishing connections among partners across systems."

Shared Infrastructure

Based on years of learning about other forms of support that serve as a foundation for multi-stakeholder collaboration, the NWCEH adopted the following infrastructure, applying the principles of collective impact:³⁴

Aligned resources – “Through NWCEH’s distributed leadership structure, we aim to ensure that all of the funding our region receives for the work of ending youth homelessness is aligned and on target with our strategic plan and priorities—and that all projects are equitably designed with participation of youth with lived experience,” explains Halladay-Schmandt. Weaving together different funding streams in this way strengthens the NWCEH’s ability to carry out the Community Plan and more equitably and effectively serve area youth/young adults.

Backbone support – For some time, the NWCEH relied almost entirely on service-providing staff from member agencies to support the work of ending youth/young adult homelessness. “We learned that if you don’t have staff to advance systems change work—to literally call the meetings—then it’s just not going to happen,” Allen says emphatically. The NWCEH now provides backbone support for the

YHDP by guiding vision and strategy in partnership with the YAB Chair, acting as a convener, supporting aligned activities, establishing shared measurement practices, building public will, advancing policy, and mobilizing funding.

Committees and working groups – To complement the backbone support, equitably distribute power, and facilitate information flow, the NWCEH now has several leadership committees—including an executive committee, steering committee, and planning and partnerships committee, among others—working groups, and an engaged Youth Action Board, all of which center the voices and leadership of youth/young adults with lived experience.

Decision-making – Decisions within the NWCEH are made using a consensus model. The Coalition also uses a guide called Levels of Decision-Making for Youth³⁵ to engage youth/young adults in decision-making and reinforce a culture of respect and accountability.

Shared values – Members of the NWCEH share the values of accountability, collaboration, and a commitment to data-driven decision-making.³⁶

Phase 4 - Learn and Adapt for Continuous Improvement



Foster a culture of learning to support ongoing adaptation and improvement, and adopt practices to regularly take stock of progress toward short- and long-term goals.

Fostering a culture of learning

A systems change initiative’s ability to adapt to changing contexts—no matter whether they arrive as a result of global pandemics or local elections—

seems to correlate directly with its relationship to learning. NWCEH members recognize the critical role learning plays in their collective sensemaking, adaptation, innovation, and improvement. They rely on the following activities, among others, to bolster their individual and collective capacity to advance their shared goals.

Trainings on systems change have proven to be helpful for building NWCEH members’ capacity for a new way of working. For example, A two-day training hosted by Rotary Charities with author David Peter Stroh on lessons from his book *Systems Thinking for Social Change*³⁷ supported NWCEH members in building a shared understanding of

³⁴ Kania, John, and Mark Kramer. “Collective Impact.” *Stanford Social Innovation Review*, 2011. https://ssir.org/articles/entry/collective_impact.

³⁵ Levels of Decision-Making for Youth, Northwest Michigan Coalition to End Youth Homelessness, <https://static1.squarespace.com/static/5ed01d42ee67267f4f242c48/t/635fece4161b1a5f3e0bdf14/1667230950520/Levels+of+dec.+making+for+youth.PNG>

³⁶ Available from: <https://www.endhomelessnessmi.org/about-us>

how change happens. Additional trainings on the collective impact model provided guidance on how to organize the Coalition's infrastructure for high-level collaboration among diverse stakeholders.

Upon receiving funding from Rotary Charities, the NWCEH was invited to appoint a Learning Steward to document the Coalition's learning journey and support members with skill building. Elaine plays the Learning Steward role and also participates in Rotary Charities' Systems Change Community of Practice, a facilitated space where practitioners engage in peer learning around common systems change challenges, such as measuring progress, communications and storytelling, and network health and well-being. NWCEH members also participate in a YHDP cohort, an additional opportunity for peer learning with communities across the country and technical assistance from HUD.

Allen notes that cultivating a systems mindset requires "constant practice." Halladay-Schmandt adds, "We're getting good at using consistent language," acknowledging how important both practice and consistency are for the challenge of maintaining a shared understanding among stakeholders when people come and go from systems work.

Ongoing evaluation

NWCEH members use a combination of evaluation practices to keep track of their progress toward short- and long-term goals, as well as their headway toward transforming the larger system central to the work of ending youth/young adult homelessness.

Through their involvement in the YHDP cohort, NWCEH members received support from HUD technical advisors in developing indicators for positive explicit structural change within the youth homeless response system. Indicators include the number of youth/young adults transitioning into secure housing, for example, and the ability of youth/young adults to maintain their own housing

once they secure it. The NWCEH's Continuous Quality Improvement Committee meets monthly to assess outcomes of the response system. As YAB Chair, Elaine's involvement in these meetings is crucial for sharing feedback from youth listening sessions and supporting adult partners in acting on it.

To complement the indicators of change, the NWCEH uses systems performance measures to assess the semi-explicit relational changes that contribute to ending youth/young adult homelessness, including collaborative partnerships among service providers from the youth homeless response system, as well as their partnerships with providers from other youth-serving systems, such as the juvenile justice, education, child welfare, and behavioral health systems.

Finally, to assess implicit transformational change within the system, YAB members provide the best source of feedback through their ongoing sensemaking at listening sessions. There, they reflect on how adult service providers and community members understand, respect, and equitably empower them, and discuss to what extent the youth homeless response system supports them in feeling more self-sufficient as they age. "Systems change isn't a one-and-done process. It's the recognition that the system will continually change over time. Our hope is that that system will continue to improve thanks to advising from the YAB," reflects DeGroot.

As a result of these evaluation practices and more, Halladay-Schmandt acknowledges that "The Coalition's shared awareness of the system and the problems contributing to it staying 'stuck' are ever-evolving."

Signals of change

The long play of transforming a complex system can be a challenging (and often frustrating) reality for everyone involved. "Change across our system doesn't happen overnight. That's something we struggle with," admits Clore. Even so, the NWCEH's

³⁷Stroh, David Peter. *Systems Thinking for Social Change: A Practical Guide to Solving Complex Problems, Avoiding Unintended Consequences, and Achieving Lasting Results*. Chelsea Green Publishing, 2015.

learning and evaluation practices support members in identifying the signals of change that reveal how the system is transforming as a result of their and their partners' collective efforts.

After six years of mutual learning and constant iteration, providers across the youth homeless response system are now able to quickly identify the youth/young adults experiencing homelessness, assess their circumstances, and intervene to end their homeless experience in ways that are informed by youth/young adults with lived experience themselves. Thanks to these improvements, data updated monthly shows that there have been more *youth/young adults exiting homelessness* than entering it across the five counties served by NWCEH since April 2022. This means that, month-over-month, the coalition has achieved an average of "functional zero" youth homelessness.

Importantly, Halladay-Schmandt has also observed greater buy-in among service providers for listening sessions where they have the chance to learn from youth/young adults with lived experience. Van Horn confirms that he believes "young people are prioritized differently today" within the system. And even within the work to improve the adult homeless response system, service providers are now asking with greater intention and frequency what the recipients of services and programming need and want.

"We will always be committed to hearing from the people who experience the system and hold that above everything else."

— Ashley Halladay-Schmandt, Director, Northwest Michigan Coalition to End Homelessness

Looking Ahead

There is significant progress to celebrate as a result of NWCEH members' collaboration to advance their shared goals, most notably that the system, to use Halladay-Schmandt's phrase, "is inching closer to 'functional zero' youth/young adult homelessness."

By focusing on opportunities for leverage and adopting new ways of working together, NWCEH members are demonstrating the power of a systems approach to create the conditions for transformational change.

It seems NWCEH's success can be attributed largely to its members' concerted effort to center the voices and leadership of youth/young adults with lived experience and to continually ask service providers from both the youth homeless response system and other youth-serving systems what they need from the Coalition to prevent and end youth/young adult homelessness. Clore acknowledges that this requires a commitment to working together, which begs the strategic question, "How can we continue to strengthen the connections and bridges between us and our services and programs?" A pertinent inquiry, especially only a few years after the COVID-19 outbreak.

As NWCEH members press ahead in the work of aligning programs and services around the common goal of ending youth/young adult homelessness, Halladay-Schmandt says the next step is "to bring greater awareness to this way of working and to the work itself" in the hope of garnering more community participation. After all, Coalition members have heard time and time again that if just one person had been supportive of a youth/young adult, then that youth/young adult might have had the opportunity to change the trajectory of their life—and keep from falling through the cracks.

"Prior to this work, a homeless response system specifically for young people did not exist. We now have more people leaving homelessness than we have entering it—and we're seeing our system inching closer to 'functional zero' youth/young adult homelessness."

— Ashley Halladay-Schmandt, Director, Northwest Michigan Coalition to End Homelessness

For more information on this story, please contact Ashley Halladay-Schmandt at ashley@endhomelessnessmi.org.

A Story of Change:



Securing Healthy Food Access in Northwest Michigan

"I was waiting for something like this to happen, and I'm so excited to be a small part of it. I get to see our neighbors choose fresh, healthy food from pantry shelves, feeling a sense of respect and dignity."

— Anneke Wegman, Co-Chair, Northwest Food Coalition Purchasing Committee

"I'm ecstatic about the local fruits and vegetables. My grandson and granddaughter live with me, and fresh produce from the pantry is their special treat. They just love it! With the price of everything so high anymore, the pantry is so helpful. A lot of families like ours depend on it."

— Lisa Tanner, neighbor and visitor, Buckley Food Pantry

Introduction

Over the last five years, the Northwest Food Coalition, Goodwill Northern Michigan's Food Rescue, and Groundwork Center for Resilient Communities have progressively moved into deeper partnership to strengthen the emergency food system in Northwest Lower Michigan. United by a shared commitment to addressing local food insecurity, the three groups work together to create greater access to healthy food for more than 70,000 individuals at risk of food insecurity across five counties—a region twice the size of Rhode Island.

From purchasing locally grown food, to rescuing and distributing food, to operating pantries and community meal sites, the role each group now plays is complementary and vital to providing the community with greater access to high-quality, nutritious food. Yet the success of the Healthy Food Access Partnership doesn't stop there. Their collective efforts have bolstered the local food economy and transformed the relationships among the three groups, amplifying their power to sustain healthy food access for all.

What follows is the story of how these three groups built on the legacy of two decades of work to address food insecurity in Northwest Lower Michigan by overcoming the challenges inherent to high-level collaboration and adapting in mutually beneficial ways to a rapidly shifting context brought about by the COVID-19 pandemic. An emergent story of systems change, it is organized into four phases of development that support multi-stakeholder initiatives in creating lasting positive impact.

The Healthy Food Access Partnership serves community members in Antrim, Benzie, Grand Traverse, Leelanau, and Kalkaska Counties in Northwest Lower Michigan. The Northwest Food Coalition also serves Wexford County.

The issue of food insecurity in Northwest Lower Michigan

Food insecurity, or the condition of having limited or uncertain access to adequate food, is a threat to individuals and families across Northwest Lower Michigan as a result of a confluence of factors, including income levels, unemployment, food pricing and availability, consumer demand, and consumer knowledge of nutrition and cooking.

Data from 2018 shows that 18,200 individuals lived below the poverty threshold in the five-county region and that an additional 52,085 struggled, despite being employed, to afford the basic necessities of food, housing, health care, child care, and transportation due to income constraints. All 70,285 individuals were at risk of experiencing food insecurity.³⁸

The emergency food system serves as an essential social safety net—one that these individuals consistently rely on. Data from 2019 shows that local pantries and community meal sites collectively receive roughly 20,000 visits from neighbors³⁹ experiencing food insecurity each month, including seniors, veterans, disabled people/people with disabilities, and unemployed or low-income individuals and families.

The Healthy Food Access Partnership uses the definition of food insecurity provided by the U.S. Department of Agriculture: food insecurity is the condition of having limited or uncertain access to adequate food.⁴⁰



³⁸ ALICE in Michigan: A Financial Hardship Study, United Way of Northwest Michigan, 2019, <https://unitedwaynwmi.org/wp-content/uploads/2022/10/2019-ALICE-Report-FULL.pdf>.

³⁹ Here, *neighbor* refers to any individual experiencing food insecurity who visits a local pantry or meal site.

⁴⁰ Available from: <https://www.ers.usda.gov/topics/food-nutrition-assistance/food-security-in-the-u-s/definitions-of-food-security>

Two decades of work to address regional food insecurity

In 1994, these very pantries and community meal sites came together on the belief that they would be better positioned to address hunger across the region through greater coordination. Together, they formed the Northwest Food Coalition, an informal association of roughly 70 volunteer-run food pantries, faith-based food pantries, baby pantries, high schools, Grand Traverse Band of Ottawa and Chippewa Indians centers, community meal sites, and community mental health centers. Members began meeting monthly to share resources and develop joint programming under the leadership of Val Stone, who has served as the Coalition's coordinator for 28 years.

In 2002, Groundwork Center for Resilient Communities began working to build the regional food economy out of the recognition that supporting local food production benefits community health, increases farm incomes, and protects farmland from development. Over time, Groundwork Center evolved its programming to include working in area schools to connect locally grown food and food education to school children with the purpose of increasing their health and furthering positive economic impacts for farmers. While the early years of Groundwork Center's food and farming programming did not include working with food pantries and meal sites, the organization's early efforts to build a regional food economy provided the foundation it would later use to become a critical partner in the effort to increase healthy food access to individuals and families experiencing food insecurity across the region.

By 2008, the issue of food security attracted the attention of a new group of community members in Traverse City wanting to increase the amount of fresh food available in pantries. They came together to found Food Rescue to address a critical problem they had observed in the local food system: 36% of households in the region struggled with food insecurity, meanwhile, 40% of good food went to waste at local grocery stores, bakeries,

and farms. Food Rescue joined with Goodwill Northern Michigan's logistics, taking advantage of an opportunity for impact. Goodwill provided a home for the Food Rescue program to collect and distribute both "rescued" and purchased food to Food Coalition members at no cost to the pantries and meal sites. All Coalition members are eligible to receive food from Food Rescue. The alignment between the Food Coalition's needs and Food Rescue's operations set the two groups up for a strong, albeit informal, partnership and resulted in the successful diversion of millions of pounds of soon-to-expire food from waste bins into the hands of those who need it most.



In 2008, 36% of households in the region struggled with food insecurity. Meanwhile, 40% of good food went to waste at local grocery stores, bakeries, and farms.

Food Rescue began to prioritize the distribution of healthier food in 2012, stopping pickups of soda, for example, and eliminating other unhealthy products from its distribution. This shift opened up more physical space on Food Rescue trucks to pick up healthier food, and, consequently, set Coalition members up to dedicate more space in freezers, fridges, and other storage shelves for nutritious food, including fresh produce.

By 2014, the need for a clearer picture of regional food insecurity surfaced, and, on behalf of the Benzie Sunrise Rotary Club, Kris Thomas led a Food Security Study⁴¹ for the five-county region. With the support of other volunteers, Thomas spent seven months interviewing over 400 neighbors who use area food pantries and meal sites. "Not having previously known anyone that I knew was experiencing food insecurity, I was heartbroken to hear the stories of so many of my neighbors who didn't have access to enough healthy, nutritious food, even though we live in a farming community," Thomas recalls tenderly. She found that most neighbors were eager to share their stories and

⁴¹ Food Security in the Michigan Counties of Antrim, Benzie, Grand Traverse, Kalkaska and Leelanau, Benzie Sunrise Rotary Club, 2014, https://northwestmifoodcoalition.org/wp-content/uploads/2022/08/Food-Security-Study-in-Grand-Traverse-Area_Oct-7_2019.pdf.

discovered a great need to provide more fresh healthy food to neighbors, along with nutrition and culinary education. Her work resulted in a list of 10 recommendations for strengthening the emergency food system.

Thomas presented her findings to the Food Coalition and Food Rescue, among other groups interested in the issue, in the hope of advancing the improvements. Meghan McDermott, who at the time was a FoodCorps service member with Groundwork Center and now serves as the organization's deputy director, recalls concern among some that promoting the need for greater access to healthy food would cause some pantry and meal site volunteers to feel that their work over the last two decades "wasn't good enough." Thomas recruited support from Michele Worden, who went on to become a dedicated Food Coalition volunteer, in approaching the Coalition's membership. Despite the initial concern, an informal survey of members indicated two top priorities: formalizing a leadership structure for the Coalition and increasing the availability of fresh fruits and vegetables for neighbors.

Thanks to Thomas' efforts, the 2014 Food Security Study ultimately became a catalyst. Food Rescue further expanded its healthy food initiatives and redesigned its distribution system to increase food access in the outlying counties, matching rates of poverty with pounds of food received by county. "It started to become clear that the pantries wanted to give neighbors fresh food," says Taylor Moore, who has overseen the Food Rescue program since 2015 and now serves as its director. "I saw the Food Coalition as a conduit to the community and wanted Food Rescue to be fully aligned with the Coalition's needs. We began focusing on putting our resources into healthy food." Food Rescue soon partnered with Benzie Sunrise Rotary to create Healthy Harvest, a program to glean leftover and donated produce from local farms, and the Food Coalition began supplementing the canned and boxed goods on pantry shelves with fresh food.

With improvements to food distribution underway, in 2016 the Food Coalition sought the support of both Food Rescue and Groundwork Center to assess the operational side of the emergency

food system, which required a more formal survey of its members. "There wasn't a formal database listing all of the pantries and meal sites at the time," recalls Stone, noting the diversity of Coalition members. Some pantries and meal sites have abundant resources, regular operating hours, and capacity for both storing and purchasing food in addition to what they receive from Food Rescue. Many have limited resources, infrequent operating hours, and limited capacity for food purchases and/or storage. The survey found that the emergency food system needed to increase its overall capacity in order to both meet the growing demand for high-quality nutritious food—specifically local produce—and to offer nutrition and culinary education.

"As a community, we needed to move beyond the idea of simply filling bellies to really looking at what's best for the health of our neighbors."

— Kris Thomas, Author, 2014 Food Security Study

Phase 1 - Convene Stakeholders and Commit to a Shared Purpose



Convene diverse stakeholders to explore how they might work together to address the source of a complex problem and define a shared purpose for their collaboration.

A nascent network forms

Over the course of approximately four years, the Food Coalition, Food Rescue, and Groundwork Center garnered interest in the results of the two studies from other key stakeholders invested in the local emergency food system, including Michigan State University Extension, Great Lakes Culinary Institute, Munson Healthcare, and local Rotary Clubs, among others. Together they became a loose network with representation from all of the various food initiatives across the five-county region and were positioned to explore how to use their collective resources to better serve people experiencing food insecurity throughout their community.

Committing to a shared purpose

By 2016, the community's understanding of the interconnection of food and health began to change, as a result of new perspectives joining the conversation and organizations like Rotary Charities publicly exploring the need for a systems approach. With the Food Coalition and Food Rescue providing infrastructure and operations for the local emergency food system, at this stage the network aligned around a desire to build a more robust, interconnected community asset. Stakeholders united behind the shared purpose of improving the emergency food system's capacity to provide the 70,000 individuals at risk of food insecurity with access to healthy food, along with nutrition and culinary education.

"There is a myth that we can 'food bank' and 'food rescue' our way out of hunger. It's unfortunate that it exists, because if we're truly going to have an impact on hunger in our community, it needs to be done collectively in an organized way."

— Taylor Moore, Director, Food Rescue

Phase 2 - Explore the Problem and Find Opportunities for Leverage



Explore the upstream causes of the complex problem to develop a shared understanding of the system and to identify promising opportunities for targeted intervention.

Mapping the system for shared understanding

Although the nascent network did not set out from the beginning with the intention of advancing deep systemic change, stakeholders saw the value of looking upstream to identify the sources of food insecurity—the “why” behind the issue.

In 2017, Rotary Charities supported a team of Food Coalition Operating Committee members

to participate in a free Systems Practice course offered through the Acumen Academy.⁴² The intention was to expand the group's shared understanding of the issue to include the “why,” not just the “what,” which was illuminated by the two assessments of the current state of food insecurity and of the emergency food system's operations in Northwest Lower Michigan. With leadership from Worden, the team co-created a systems map⁴³ exploring the numerous influences on a person's ability to meet their nutritional needs while experiencing food insecurity. “There was a huge learning curve around systems change and its nomenclature, but the process was just as important as the outcome,” reflects Mary Clulo, who participated on the team and serves as the Food Coalition's Operating Committee's chairperson. “We had many lightbulb moments discovering just how interrelated the influences on food insecurity are.”

With a map portraying the perspective of individuals experiencing food insecurity in hand, the team turned to network partners for input on the places where targeted intervention would enable the stakeholders, if they worked in coordination, to meet the needs of those individuals. The map reaffirmed the need to provide greater access to healthy food: “Healthy food became the clear leverage point for affecting people's ability to improve their health and meet their nutritional needs,” asserts Clulo.

The team believed that the network was well positioned to act on the insights of the map, however, they needed full support of the Food Coalition's membership to make change. “The mapping process allowed us to return to the Coalition with a final product and share the story it told,” recounts Clulo. Again, despite earlier concerns about promoting the need to increase access to healthy food, pantries and meal sites were enthusiastic about the opportunity to scale up the amount of healthy food they provided to the community. “The 2014 Food Security Study and the systems map provided evidence that the community's health was at stake,” recalls

⁴² Available from: <https://acumenacademy.org/course/systems-practice>

⁴³ Available from: <https://northwestmifoodcoalition.org/farm2neighbor>

Stone. Mindsets began to shift around the critical importance of healthy food and the role of the emergency food system in community health.

Opportunities for leverage

Through the systems mapping process, the team identified three opportunities for leverage that would have the greatest effect on decreasing local food insecurity at two levels of the emergency food system: structural and transformational.⁴⁴

Structural change (policies, practices, and resource flows) – Leverage opportunities included:

- Increasing the amount of fresh healthy food available at local food pantries and meal sites by improving food storage, distribution, and purchasing power
- Providing nutrition and culinary education

Transformational change (mental models) – Leverage opportunities included:

- Raising public awareness of the needs of people experiencing food insecurity

Turning insight into immediate action

Viewing the issue through a systems lens highlighted the interdependence of all the actors—from the groups themselves to the individuals they served—in meeting their needs and advancing their independent and shared goals. The success of Food Rescue's programming, for example, depends on the ability of Food Coalition pantries and meal sites to give food to community members; meanwhile the quantity and quality of food pantries and meal sites are able to provide hinges on Food Rescue's distribution infrastructure. The relationships are interdependent and symbiotic at their best.

The timing of the systems mapping process and these insights could not have been better. Not long after identifying leverage opportunities, in 2018 Thomas lobbied several local Rotary Clubs for funding to start a local food purchasing initiative. Upon receiving a small grant, the Food Coalition launched the Farm2Neighbor Program⁴⁵ to purchase fresh fruits and vegetables from local farmers for distribution through pantries and community meal sites. Better still, Coalition members didn't need to expend any resources to participate. "There was no risk to them, just pure gain," says Clulo. Not to mention the "element of dignity," adds Moore. "The pantries wanted to give high-quality nutritious food to individuals and families and now they could."

Groundwork Center connected the Coalition to Providence Organic Farm, the first farm to participate in the program, and oversaw a part-time coordination role filled by Christina Barkel to facilitate food purchases, thanks to funding from the Michigan Health Endowment Fund. With distribution support from Food Rescue, the Farm2Neighbor Program purchased and distributed roughly 8,000 pounds of food from seven local farms to pantries and meal sites in its first year. The Farm2Neighbor program has since gone on to complement its local food purchases with nutrition and culinary education promotion in pantries and schools.

"We knew we needed to strengthen our local food system, and by prioritizing access to healthy food from local farms, we opened the door to so many new possibilities."

— Taylor Moore, Director, Food Rescue

⁴⁴ Kania, John, et al. FSG, 2018, *The Water of Systems Change*, https://www.fsg.org/resource/water_of_systems_change.

⁴⁵ Available from: <https://northwestmifoodcoalition.org/farm2neighbor>

Phase 3 - Design and Carry Out a Constellation of Actions



Design and carry out a systems-change strategy sequencing the actions necessary for creating out-sized impacts throughout the whole system.

Inspired by the outcomes of the systems mapping effort and the successful launch of the Farm2Neighbor Program, in 2018 Food Rescue, the Food Coalition, and Groundwork Center applied for a grant from Rotary Charities to act on the three leverage opportunities and scale the level of access to healthy food and nutrition and culinary education for families and individuals experiencing food insecurity across Northwest Lower Michigan.

The Rotary Charities grant was the first funding opportunity Food Rescue pursued in partnership with the Food Coalition, in part because the Coalition didn't have organizational status. Moore also knew from colleagues in other cities that food rescue organizations typically become the lead entities in emergency food systems. But that wasn't his vision for the system in Northwest Lower Michigan. "I was adamant about wanting Food Rescue and the Food Coalition to hitch our wagons together," recalls Moore. "It was clear to everyone involved that if we could find a way to collaborate at a higher level, we would achieve a tremendous amount together."

But hitching their wagons together proved to be easier said than done. "We were awarded the funding from Rotary Charities based on our concept, and we hit roadblocks right away with implementing it," says Clulo. Nearly six months into the grant period, the groups were still struggling to build consensus around a long-term vision and hadn't achieved any near-term goals, including establishing a Food Security Council to oversee the collaborative effort and develop an action plan. "People had their own stake in things, their own perspective, and it took time (and some hardship)

to understand competing priorities," Clulo adds. Moore acknowledges that the group also lacked the tools for facilitating collaborative decision-making, and as a result, the process of aligning around a clear goal was complex and messy.

When the groups brought their update to Freya Bradford, who advised the grant for Rotary Charities in her role as director of systems change and learning, she listened openly. "Thanks to the recent shifts Rotary Charities made within their grantmaking practices placing greater priority on trust and adaptability, Freya offered *more* support," explains McDermott, acknowledging that another funder may have responded instead by taking resources away. "This was our first year funding systems change initiatives," says Bradford. "We knew that this kind of multi-stakeholder work is challenging and that we needed to keep an open door and build trusting relationships with grantee partners to really understand how we could be most supportive." Bradford arranged for an external facilitator, Megan Motil,⁴⁶ to support the groups in developing a partnership agreement outlining their roles and responsibilities.

"There were times when we all felt like it was just too much to learn new approaches and attend more meetings," admits McDermott. Yet she, Clulo, and Moore agree that it would be hard to overstate the importance of the risk Rotary Charities took in requiring grantee partners to work in different ways to be eligible for grant funding. They felt Rotary Charities' new orientation was critical in supporting their own shift, to use Clulo's phrase, "from opportunistic to strategic action," which required high-level collaboration.

"This work is all about relationships, and it's natural to experience tension points throughout a collaborative process. You don't grow without some tension."

— Meghan McDermott, Deputy Director, Groundwork Center for Resilient Communities

⁴⁶ Available from: <https://www.rotarycharities.org/systems-change-coaching>

A constellation of mutually-reinforcing actions

While some initiatives arrive at this phase of systems change with a fully developed strategy, in the case of the Healthy Food Access Partnership, the process of establishing working agreements and adding other infrastructure supports—such as committees to guide and govern their collective efforts—ultimately became the set of mutually-reinforcing actions that created the conditions for transformation within Northwest Lower Michigan's emergency food system. What follows are some of the actions that show not just how the partnership among the Food Coalition, Food Rescue, and Groundwork Center deepened, but also how the group leverages their collective strengths to create change at a scale that no single entity would be able to achieve on their own.

Structural change (policies, practices, and resource flows)

Crafting a partnership agreement: With external facilitation support from a consultant, the Food Coalition, Food Rescue, and Groundwork Center crafted a partnership agreement that distributed power and responsibility, clarified roles, established methods for accountability, and supported their realignment around the shared goal of increasing access to healthy food and nutrition education for individuals experiencing food insecurity.

The success of their partnership agreement later influenced other local multi-stakeholder initiatives and became a learning opportunity for Rotary Charities as well. Bradford reflects, "In this first year of our systems change funding, we weren't requiring partnership agreements with collaborative grant applications, and the Healthy Food Access Partnership was not alone in their struggle post-award. Most initiatives in our first funding round spent several months negotiating working agreements. Since then, we've provided up-front support and learning opportunities to groups and now require agreements at the point of application for our larger grants."

Expanding food storage and distribution infrastructure:

The Food Coalition's 2016 operational assessment identified food storage, distribution logistics, and purchasing power as the three primary factors limiting its members' ability to meet the community's demand for nutritious food. The opportunity to address two of those three factors came with the Rotary Charities grant resources. In 2019, allocations were made for purchasing equipment to move and stack pallets of food, as well as bag sealers for repackaging food in small quantities. Food Rescue also allocated space for Food Coalition members in its walk-in coolers, freezers, and dry storage and provided assistance with produce repackaging. Finally, additional funding from a generous donor and the Michigan Health Endowment Fund enabled Groundwork Center to launch its Building Resilient Communities program to support Coalition members with the purchase of freezers, fridges, and other produce storage for their own facilities.

With working agreements and added infrastructure support in place, the groups were "completely poised" to leverage their partnership, reflects Clulo—just in time for an event that would put their relationships to the test.

COVID-19 changes everything: In March 2020, the COVID-19 pandemic brought about a rapid change in context. Job losses resulted in rising unemployment. Panic buying led to food supply shortages. Pantries and meal sites struggled to keep their volunteers and neighbors safe. And executive orders from State of Michigan officials led to restaurant closures and farmer's market cancellations, causing local farmers to question whether or not they would have a market for their crops in 2020 at all.

The unprecedented level of uncertainty in food supply chains and the local food economy resulted in an immediate need for a coordinated response to ensure that all members of the community would have access to healthy, nutritious food.

"In March 2020, no one knew what was going to happen. With restaurants closed and farmer's markets canceled, farmers questioned whether they should even put plants in the ground."

— Meghan McDermott, Deputy Director, Groundwork Center for Resilient Communities

Launching the Local Food Relief Fund:

Under McDermott's leadership, in April 2020, Groundwork Center launched the Local Food Relief Fund,⁴⁷ a fundraiser designed to support pantries in purchasing food from local farmers for families hit hard economically by COVID-19. "I remember Meghan called to ask, 'If we reach out to Groundwork's donor base and raise maybe \$30,000, do you think the Food Coalition could move that amount?' I replied, 'Absolutely,'" recalls Clulo. Excitement grew around the fundraiser's goals:

To purchase available local crops and guarantee purchases throughout the growing season, creating financial stability for farmers;

- To keep pantry shelves stocked with nutrient-dense food for families in need; and
- To strengthen the regional economy and food supply chains by keeping purchases local.

Many community members at the time weren't aware of the extent to which the region struggles with food insecurity. The Local Food Relief Fund not only raised their awareness, but also motivated them to give—and give generously. The fundraiser swiftly surpassed the original \$30,000 goal within 24 hours and ultimately brought in over \$190,000 from more than 600 individual donors, demonstrating the power of the community in confronting the looming public health crisis. "The reception was wonderful to the goal of improving people's lives and health," recalls Stone. "The idea that we could raise money to buy local, healthy food was such a turning point."

One hundred percent of all donations were given to the Food Coalition, Food Rescue, and The Manna Food Project to purchase and distribute local food, including produce like parsnips, carrots, beets,

asparagus, green beans, pears, and more. "The Fund brought healthy food to pantry shelves in a way that we'd never seen before," says Moore.

"At a time when many farms had the last of their storage crops lined up for restaurant sales and were counting on cash flow to fund spring plantings, the ability to get paid for feeding low-income families in our community was a godsend during the COVID-19 crisis."

— Local farmer

Launching a representative Food Coalition

Purchasing Committee: As the pandemic surged, the Food Coalition struggled to match its operational capacity with the inflow of financial contributions from the Local Food Relief Fund and elsewhere. Food Rescue, deemed an essential service, continued distributing food and became a critical source of real-time information about the needs and capacity of food pantries and meal sites across the region. In April 2020, questions related to the efficiency and equity of food purchasing and distribution led Moore to call for a new version of the Food Coalition Purchasing Committee, which previously focused on leveraging members' collective purchasing power to buy products like canned chicken and peanut butter. Moore saw the need for the Purchasing Committee to better represent the communities served by Coalition members to strengthen both its connection to community needs and its ability to make more equitable purchasing decisions.

The Food Coalition and Food Rescue promptly requested assistance from Groundwork Center in developing a new Purchasing Committee, and in May 2020, McDermott stepped in to lead the effort of establishing new purchasing guidelines, governance structures, and working agreements. Given its purpose of purchasing food on behalf of all Coalition members, as Moore had pointed out, establishing a committee representative of the Coalition's diversity was a critical first step for equitable decision-making. The committee's

⁴⁷ Available from: <https://www.groundworkcenter.org/local-food-relief-fund>

makeup now reflects the counties and populations served by Coalition members, as well as the varying sizes and services of pantries and meal sites. Groundwork Center continues to provide facilitation to support the 12-person committee's Wednesday morning meetings. "Our meetings start with a review of our community agreements, which remind us how to be decent to each other. I love it. It's been good for my personal life, too," laughs Anneke Wegman, a longtime Food Coalition volunteer who now serves as the Purchasing Committee co-chair. A typical meeting involves reviewing available produce and voting on whether or not to make a purchase.

In addition to establishing strong internal operations, to fulfill its purpose, the Purchasing Committee also required someone to serve as a liaison between local farmers and the Food Coalition. Groundwork Center secured resources from the Grand Traverse Regional Community Foundation's Urgent Needs Fund to bring Barkel on full-time to play this role and serve as the organization's food equity specialist. "I love working with farmers," Barkel says enthusiastically, "I'm a former farmer myself." Along with forming and maintaining relationships with farmers on behalf of the Coalition, Barkel manages market research to discover which farms have available produce, how much it costs, and other details like the variety, color, and size of vegetables. Barkel suggests that local farmers have long been asked to give produce away and shares her excitement for shifting from a donation to purchasing model: "It's been so great to be able to bring resources to farmers and finally pay a fair price for what they've worked so hard for."

As more local food became available, Food Rescue scaled up its volunteer operations to help handle the logistics. Pre-pandemic, volunteers came to the Food Rescue warehouse a couple of times per month to repack 800-pound bins of bulk food into 30-pound pantry-sized banana boxes and family-sized bags that the pantries could more easily handle. Much of this food included excess fruits and vegetables gleaned by volunteers from local farm fields through Food Rescue's Healthy Harvest program. With the additional local food purchased

by the Coalition for distribution, Food Rescue scaled up its volunteer operations to two sessions per week. Volunteers packed local food purchased by the Coalition in special banana boxes marked with yellow tape to help the pantries identify the food purchased by the Coalition. Food Rescue was nimble in adapting logistics to the need, even during a time of great unknowns, shelter-in-place, and social distancing. It continued its weekly rescue and distribution services, as usual at no cost to the pantries and meal sites. Food Rescue also stretched its operations to distribute USDA Farmers to Families food boxes, including a run to an airport hangar serving Beaver Island. All of these things combined led to Food Rescue distributing more food than ever before during the pandemic years.

The swift action from Groundwork Center, Food Coalition, and Food Rescue—the Healthy Food Access Partnership—dramatically scaled up the amount of fresh, nutritious food on pantry shelves. During the first year of the pandemic alone, the Partnership successfully purchased over \$100,000 of locally grown produce—amounting to a staggering 70,000 pounds—worked with volunteers to repackage it into pantry- and family-sized containers, and distributed it to food pantries and community meal sites across the region. The impact of the program has been enormous, combined with other healthy food efforts. In 2014, 13% of Coalition members reported that they had fresh fruits and vegetables available on their shelves every time they opened their doors. By the end of 2020, that number grew to 64%.

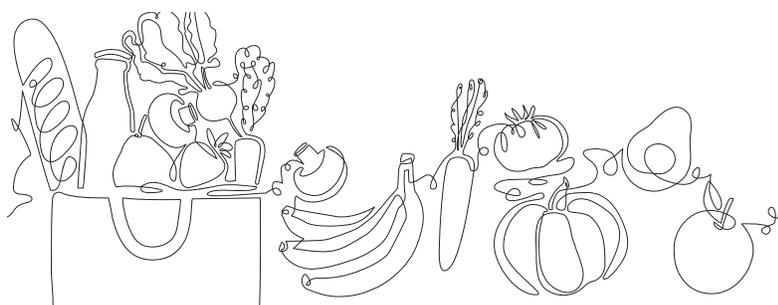
Since the pandemic, the Partnership has evolved its model to include handshake agreements for increased stability within the emergency food system and regional economy. "We've worked to put purchasing agreements in place before the season begins, so farmers know exactly what the Food Coalition wants to buy and for what price," explains Barkel. The strategy is a win-win. It gives farmers the opportunity to plan their input and labor costs with confidence, meanwhile Coalition members know when to expect produce in yellow-taped banana boxes, which supports their planning for educational materials and supplemental purchases (when extra resources are available).

Looking ahead, Barkel acknowledges that the challenge becomes securing sustainable funding for continued purchasing from local farmers. "There's a very understandable and real tension between the cost of local food and what feels like responsible resource stewardship by the Food Coalition," she says. "I've seen a gradual acceptance from Coalition members that it's worthwhile to spend more money on a local carrot versus less on one that comes from far away. If you're trying to feed a lot of people with limited resources, it can be hard to justify spending more money on local food. But the investment in the local food economy creates positive economic impacts for the region's farmers and gets higher-quality, more nutritious food to those who need it most."

Hosting a virtual Food Security Summit: For the Partnership, strengthening the regional emergency food system meant not just building more resilient pathways for people experiencing food insecurity to access nutritious local food, but also connecting those people to nutrition and food education and increasing the community's awareness about the issue of food insecurity in Northwest Lower Michigan.

In 2020 Michigan State University Extension supported the development of online nutrition and food education programming, which became available to the community on the Food Coalition's website.⁴⁸

Later that year, the four organizations built on their work together to launch the Food Security Summit, a six-part virtual event running from December 2020 to March 2021 aimed at increasing public awareness around the issue of food insecurity through sharing data and stories. Roughly 120 people attended the sessions, including individuals experiencing food insecurity, pantry and meal site volunteers, staff from participating organizations, and community members at large. Sessions explored everything from the issue itself to the available food assistance opportunities to the values that drive local solutions and more.



"The Rotary Charities grant supported our partnership agreement and collective infrastructure. Then came the success of the Local Food Relief Fund and additional resources arriving from the Michigan Health Endowment Fund. All of it allowed us to take a great leap toward achieving our goals and to boost the local food economy in a way that we never thought possible."

— Meghan McDermott, Deputy Director, Groundwork Center for Resilient Communities

⁴⁸ Available from: <https://northwestmifoodcoalition.org/farm2neighbor/videos>

Shared Infrastructure

As the story suggests, the Healthy Food Access Partnership has not just endured, but flourished despite the challenges brought on by managing an inflow of resources beginning with the Rotary Charities grant and the changes that resulted from the COVID-19 pandemic. Perhaps what makes its success even more remarkable is that the Partnership never defaulted to centralized leadership and instead learned to operate in mutually beneficial ways with a more distributed leadership model. "I've learned that you can still have leadership without a central leader," reflects Moore. "We each take the lead on different areas of our work." Clulo seems to agree, adding, "Some of our success can be attributed to people accepting their role in shared leadership and acknowledging other people's unique strengths."

Yet even in decentralized systems change initiatives like this one, some form of shared infrastructure is usually put in place to support mutually reinforcing action and continually strengthen the alignment of various participants toward a shared goal. Over time, the Healthy Food Access Partnership has established different supports to do exactly that.

Aligned resources – Building on the legacy of the Rotary Charities grant, the Partnership now regularly seeks joint funding opportunities to support mutually reinforcing action.

Partnership agreement – The process of creating the partnership agreement (or memorandum of understanding), as well as the agreement itself, served Food Rescue, the Food Coalition, and Groundwork Center by creating a strong foundation from which to operate.

Committees – The Healthy Food Access Partnership has formed a number of different collaborative committees to guide aspects of their collective work, from the Food Coalition Purchasing Committee to the Food Security Summit Advisory Committee (which existed for a short time to produce the event), as well as a loose Fundraising Committee.

Taken together, these supports, along with the muscle memory of successful collaboration in recent years, have succeeded in building a resilient partnership among the three groups, with Groundwork Center facilitating food purchasing, Food Rescue managing food rescue and distribution logistics, and the Food Coalition overseeing the operations at pantries and meal sites across the five-county region. "What we have now is a consummate intertwining of the three groups in a very effective partnership," says Clulo—a partnership that has already markedly increased the capacity of Northwest Lower Michigan's emergency food system to deliver healthy food to neighbors experiencing food insecurity.

Phase 4 - Learn and Adapt for Continuous Improvement



Foster a culture of learning to support ongoing adaptation and improvement, and adopt practices to regularly take stock of progress toward short- and long-term goals.

Fostering a culture of learning

When asked what role learning plays within the Healthy Food Access Partnership, without hesitation McDermott rhetorically asks, "What role hasn't it played?"

Moore credits the Partnership's commitment to transparent communication in fostering a culture of learning. "In the beginning, poor communication hindered our work. We just weren't hearing each

other, so we couldn't learn from one another," he says. After outlining how the groups would interact and communicate in their partnership agreement, they began "sharing information we had never shared before," Moore goes on, which enabled the rapid learning and adaptation they've demonstrated to date.

The Partnership also acknowledges their participation in Rotary Charities' Systems Change Community of Practice—a facilitated space where practitioners engage in peer learning around systems-based approaches—as another important source of learning. Clulo, Moore, and McDermott especially value ongoing reflection about the intersections of the local emergency food system with other systems, like healthcare and transportation.

Ongoing evaluation

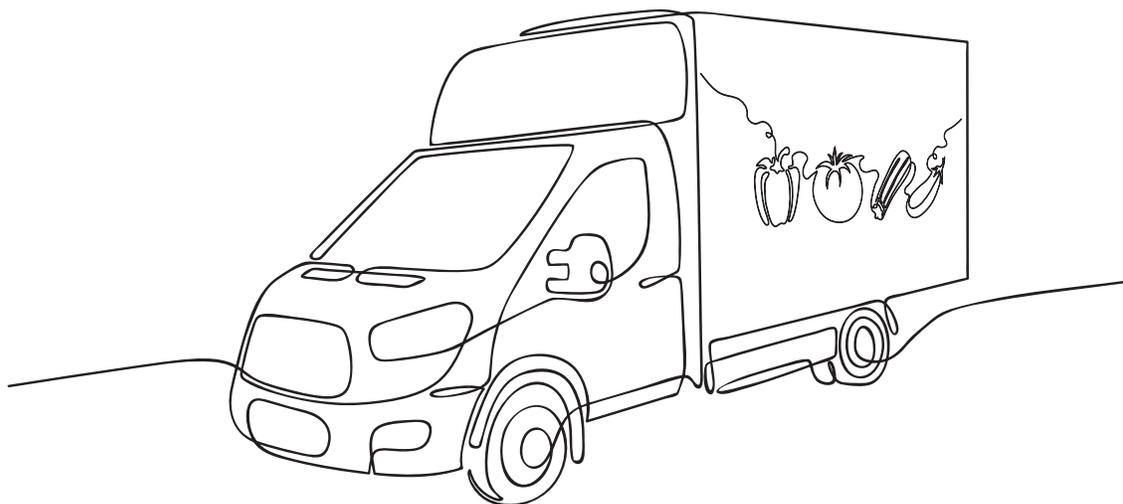
The Healthy Food Access Partnership relies on both traditional and non-traditional evaluation techniques to foster accountability and to take stock of their progress toward shared goals.

On the purchasing side, the Partnership has been tracking both the number of pounds of local produce purchased and the number of participating

farms since 2018. Data shows that, between 2018 and 2022, agreements have been made with 21 area farms for the purchase of 257,089 pounds of produce—roughly equivalent to a whopping 428,482 large potatoes at just over eight ounces each or 1,028,356 large carrots weighing four ounces each.

In terms of food distribution, tracking has notably improved with concerted effort from Food Rescue. In 2015, only 60% of food distributed by Food Rescue could be accounted for by county and the specific pantry or meal site served. By 2019, just four years later, that number grew to 98%. Insights gathered from this data paved the way for Food Rescue to implement equitable distribution measures. It now evaluates the number of pounds of food distributed per person living below the poverty threshold within each of the five counties. Using this data, Food Rescue adds and rearranges truck routes to deliver food to counties experiencing the greatest need, recently doubling, for example, the amount of food distributed to Kalkaska and Benzie counties.

On the operational side, evaluation proves to be more challenging. While the Food Coalition collects data on the overall number of pantry and meal site visits on a monthly basis, many acknowledge



the difficulty of tracking the number of unique versus repeat visitors. With a priority on respecting neighbors' dignity, many pantries, especially those that are faith-based, are reluctant to ask neighbors to quantify their need. In an effort to confront these challenges, the Food Coalition looked closely at pantry user data with additional consulting support from Motil during the height of the pandemic when other supports, such as stimulus checks, were available. What they found is that it's consistently very challenging, especially in a rural area, to assess what drives an individual's use of the emergency food system and the frequency of their pantry visits, let alone to determine need at a community level.

Even so, the Food Coalition has experimented with a relatively new participatory evaluation tool called ripple effects mapping⁴⁹ to collect the untold stories that can ripple out from a program or activity. In 2020, Food Coalition members used the technique to evaluate the Farm2Neighbor program, discovering, among other positive "ripples," increased resiliency in the local food system.⁵⁰ Thomas believes other promising evaluation practices exist: "We've learned of other hunger relief organizations that have found ways to track unique pantry visits, allowing them not only to better evaluate their impact on alleviating food insecurity, but also to make adjustments to their

work when appropriate." Thomas and others agree that there is work to be done to improve the way the Coalition tracks its impact on food insecurity.

Signals of change

Today, the Healthy Food Access Partnership's ongoing learning and evaluation practices support the groups in identifying the signals of change that reveal not just how the problem of food insecurity is improving across five counties in Northwest Lower Michigan, but also evidence suggesting that a less visible, though equally important transformation is underway.

By strengthening food purchasing, distribution, and operations within the emergency food system, the Healthy Food Access Partnership has achieved explicit change, dramatically increasing healthy food access for those who need it most. The change also signals a critical departure from the status quo. Barkel comments, "We've successfully moved away from the old food pantry model of providing only shelf-stable and calorically-dense, yet poor-quality processed food from the industrial food system to a new model of providing nutritionally rich, local foods." This shift is not only bolstering local farms and the regional food economy, but also creating the conditions for combating the negative health outcomes

During the first year of the pandemic alone, the Healthy Food Access Partnership facilitated over \$100,000 in purchases of 70,000 pounds of locally grown produce.

In 2014, 13% of Northwest Food Coalition members reported that they had fresh fruits and vegetables available on their shelves every time they opened their doors. By the end of 2020, that number grew to 64%.

Between 2018 and 2022, agreements were made with 21 area farms for the purchase of a staggering 257,089 pounds of locally grown produce.

⁴⁹ Available from: <https://extension.umn.edu/community-development/ripple-effect-mapping>

⁵⁰ Available from: <https://northwestmifoodcoalition.org/farm2neighbor>

associated with poor diets, which are often lacking in whole vegetables and fruits.

Beneath the system's surface, so to speak, there is evidence of a more implicit transformation underway. Just a handful of years ago, the Food Coalition, Food Rescue, and Groundwork Center operated independently and, at times, in competition with one another for power and limited resources. Not so today. "I'm starting to see these groups become more integrated. They aren't speaking on behalf of themselves, but on behalf of the work as a whole. The work is broadly owned, as opposed to the sole responsibility of a single grantee organization," reflects Jan Delatorre, a program officer at Michigan Health Endowment Fund who has supported the work. The groups agree. "We are stronger together," says Stone. "We don't concern ourselves with who gets credit for what. Instead, we each do our part. Our goal isn't to benefit our individual groups, but to support our neighbors."

Relational change to this extent also suggests a shift at the deepest level of the system—the realm of mindsets. The Healthy Food Access Partnership now seems to operate on the belief that their capacity for addressing regional food insecurity is contingent upon their ability to learn with and from one another, innovate collaboratively, trust each other, and set ego aside. They seem to have adopted a new mindset around how transformational change is made.

"I really appreciate the pantry and love all the people there. They're almost like family. I've been going there for a while with my sister, and they've been there during some hard times, like when I was out of work during the pandemic. Vegetables are out of reach at the store, so I loved seeing them on the pantry shelves."

— Sammy Stroh, neighbor and visitor, Buckley Food Pantry

Looking Ahead

When the Food Coalition, Food Rescue, and Groundwork Center came together to increase access to healthy, local food for community members experiencing food insecurity across Northwest Lower Michigan, the three groups likely would not have been able to anticipate how they would achieve it. As their story shows, tackling a complex community issue such as food insecurity requires time and space—and sometimes outside support—not just to understand the system in focus and identify opportunities for leverage, but also to form trusting relationships and build the capacity for different ways of working together.

Delatorre reflects that "Food security doesn't just happen to people. People have the agency to secure it for themselves and for each other. People own the system." The Healthy Food Access Partnership seems to embody this insight. Drawing on an astonishing level of commitment and passion, not to mention forward-thinking spirit in the midst of rapidly changing contexts, between 2018 and 2022, this diverse group of individuals put 257,089 pounds of locally grown produce onto pantry shelves and into the hands of neighbors. Today, they continue to harness their collective power to intentionally bring a more nutritious, resilient, and equitable emergency food system into being—thus improving the health of tens of thousands of community members across Northwest Lower Michigan.

For more information on this story, please contact Taylor Moore at taylorm@goodwillnmi.org.

A Story of Change:



Improving Health and Health Equity in Northern Michigan

"I'm thrilled to support work taking place in our local community and across the region that's looking at the social determinants of health and health disparities from a systems perspective."

— Sarah Eichberger, Public Health Nutritionist, Michigan State University Extension

"Positioned at the local level, it can be difficult to stay on top of what's happening regionally. We tend to spend time recreating wheels, so to speak. The Northwest CHIR Learning Community offered a great opportunity to network, learn from others, and bring insights back to my collaborative. I can now connect agencies in Manistee with those from other parts of the region who might offer lessons learned from their work."

— Rose Fosdick, Coordinator, Human Services Collaborative Body, Manistee County

Introduction

Since 2016, the Northern Michigan Community Health Innovation Region (NMCHIR) has been working to improve health outcomes and health equity for residents living in Northern Lower Michigan. Today, more than 160 cross-sector partner organizations work in coordination across a 31-county service area to improve the social determinants of health—the conditions in which people live, learn, work, play, and age—to achieve their shared vision of healthy people in equitable communities.

Together, partners draw on systems change approaches not just to break out of silos, but also to build the collaborative capacity required for creating a shared understanding of the broader community system and for aligning their strategies to shift the conditions that perpetuate health inequities and disparities. Thanks to their collective efforts, residents across the region are now benefitting from more fair and just opportunities to attain their highest levels of health.

What follows is the story of how NMCHIR partners are strengthening the community system's ability to respond to residents' needs and transforming individual lives in Northern Lower Michigan. A story of systems change, it is organized into four phases of development that support multi-stakeholder initiatives in advancing transformational change.

About the Northern Michigan Community Health Innovation Region

The NMCHIR is one of five CHIRs established and funded by the Michigan Department of Health and Human Services (MDHHS) in 2016. Community Health Innovation Regions, or CHIRs, represent a unique, coordinated approach to improving the conditions in which people live, learn, work, play, and age. CHIRs engage a broad group of stakeholders to identify and address factors that

affect residents⁵¹ health, such as transportation, housing, and food insecurity, as well as access to high-quality medical care. The CHIR model creates a neutral space for partners to come together around a common vision and align their objectives and services to meet the needs of their community. What results is a community that purposefully responds to residents' needs, supporting them in achieving a higher quality of life.⁵²

The NMCHIR, specifically, is a cross-sector partnership of local health departments, hospitals, community-based organizations, units of local government, insurers, businesses, academia, and residents who work together to align systems, address barriers to health and well-being, and transform individual lives in Northern Lower Michigan. Initially designated as a 10-county service area, the NMCHIR committed to scaling up over time and now serves roughly 829,860 residents across 31 counties.

Today, the Northern Michigan Community Health Innovation Region serves roughly 829,860 residents across 31 counties in Northern Lower Michigan.

"One of the most valuable aspects of the NMCHIR is its regional scope. None of our community partners' county configurations ever seem to be the same. For instance, the transportation agency serves five counties, housing serves 10, community mental health serves six, and aging serves another 10. Through the NMCHIR, we've been able to pull all the services together and grow from serving 10 to 31 counties today."

— Jenifer Murray, HUB Director, Community Connections Northern Michigan Community Health Innovation Region; Grant Coordinator, Region 2 & 3 Perinatal Quality Collaborative

⁵¹ Here, *resident* is synonymous with community member, client, or patient.

⁵² Available from: <https://michirlearning.org>

Health inequities and disparities in Northern Michigan

The conditions in which people live, learn, work, play, and age strongly influence their health, well-being, and quality of life. Referred to as the social determinants of health, these community conditions “enable people to live their lives to the fullest,” says Jane Sundmacher, the NMCHIR’s executive director. Social determinants of health can be grouped into the five domains of economic stability, education access and quality, health care access and quality, neighborhood and built environment, and social and community context. While the social determinants of health can have positive effects on people’s health and well-being, they can also contribute to health inequities and disparities at both individual and community levels.

Just as health inequities and disparities exist in many regions across the U.S., they are evident in Northern Lower Michigan. The NMCHIR’s community health assessment and improvement initiative called MiThrive suggests that residents—especially those enrolled in Medicaid—experience barriers to active living, healthy food access, affordable and safe housing, transportation options, and behavioral health care. These kinds of barriers have serious consequences for health equity, with residents of low-income areas having lower life expectancy than their more affluent neighbors. Negative impacts extend to the community level as well.

Public health and health care efforts traditionally prioritize approaches such as individual health education or case management to address the downstream consequences of health inequities and disparities, such as behavior that increases the risk of injury or disease. While these strategies can be effective at the individual level, they often leave out the upstream sources of the problem, including the community conditions that influence people’s lives. What’s more, health departments, hospitals,

and community partners seeking to improve health outcomes at the community level typically work in silos to collect data, identify priorities, and implement interventions. The process is inefficient given the complex nature of the problems and the number of providers potentially duplicating their efforts in the absence of collaboration.

*The social determinants of health are the community conditions in which people live, learn, work, play, and age that lead to a wide range of health and quality-of-life risks and benefits. They can be grouped into the five domains of economic stability, education access and quality, health care access and quality, neighborhood and built environment, and social and community context.*⁵³

*Health inequities are systemic and unjust differences in opportunities to achieve good health and well-being, such as access to health care services or affordable and safe transportation options.*⁵⁴

*Health disparities are preventable differences in health status or outcome linked to economic, social, or environmental disadvantage, such as the relationship between zip code and life expectancy.*⁵⁴

*Health equity is the state in which everyone has a fair and just opportunity to attain their highest level of health.*⁵⁵

A decade of informal collaboration to strengthen health outcomes

In contrast, the NMCHIR builds on more than 10 years of informal collaboration between hospitals, health departments, and community-based organizations to address health outcomes at both individual and community levels. In 2014,

⁵³ Available from: <https://health.gov/healthypeople/priority-areas/social-determinants-health>

⁵⁴ Braveman, Paula. “What Are Health Disparities and Health Equity? We Need to Be Clear.” *Public Health Reports*, vol. 129, no. 1_suppl2, 2014, pp. 5–7. <https://doi.org/10.1177/00333549141291s203>.

⁵⁵ Available from: <https://www.cdc.gov/chronicdisease/healthequity>

seven local health departments came together to formalize their relationships by establishing the Northern Michigan Public Health Alliance (NMPHA) with the purpose of further strengthening public health across the region.

The NMPHA embraces Public Health 3.0, a model that recognizes public health as “what we all do together as a society to ensure the conditions in which everyone can be healthy.”⁵⁶ The role of local health departments in Public Health 3.0 is to partner across multiple sectors and leverage data and resources to improve the community conditions that affect health and health equity. With this Public Health 3.0 mindset, the Alliance was thrilled when MDHHS designated it in 2016 as the backbone organization to support the NMCHIR as part of its federal State Innovation Model.

Phase 1 - Convene Stakeholders and Commit to a Shared Purpose



Convene diverse stakeholders to explore how they might work together to address the source of a complex problem and define a shared purpose for their collaboration.

Coming together to form the NMCHIR

In their first phase of development, most systems change initiatives face the critical task of co-creating a shared purpose to foster coherence across the group of participants. In the case of the NMCHIR, however, its mission to “improve population health, increase health equity, and reduce unnecessary medical expenses through partnerships and systems change”⁵⁷ was defined by the MDHHS as part of its State Innovation Model.

The emphasis on partnership and focus on addressing barriers to both health and health equity seemed to speak directly to many health

care agencies and providers across the region. “Our mission attracted a variety of stakeholders. It’s more concrete than simply saying we’re trying to make our community healthier,” recalls Emily Llore, who serves as the NMCHIR’s director of community health assessment and improvement planning. “We intentionally look upstream to focus on the social determinants of health.” Participants also seemed attracted by the numerous benefits that come with cross-sector collaboration at the regional level, including the ability to strengthen partnerships, align priorities and strategies, maximize resources, produce and compare high-quality county-level data, see and understand both local and regional patterns in population health, and leverage the group’s collective wisdom.

Over time, the NMCHIR has grown to include roughly 164 diverse partner organizations that are united behind the vision of healthy people in equitable communities, where everyone feels safe and empowered to live a healthy and fulfilling life.

“We’re not just talking about the social determinants of health—we’re actually addressing them through cross-sector collaboration. NMCHIR partners include emergency providers, police, government entities, and nonprofit entities. We focus on housing, transportation, mental health, physical health. It’s not just lip service.”

— Paula Martin, *Community Nutrition Specialist, Groundwork Center for Resilient Communities*

“My agency collects a lot of data about how community members use local services and where the gaps exist. We want to be part of conversations in the NMCHIR about the social determinants of health to uncover why the gaps exist, or why some people’s needs aren’t being met.”

— Sara Johnson, *Resource Database Manager, Community Access Line of the Lakeshore*

⁵⁶ DeSalvo, Karen B., et al. “Public Health 3.0: A Call to Action for Public Health to Meet the Challenges of the 21st Century.” *Preventing Chronic Disease*, vol. 14, 2017, <https://doi.org/10.5888/pcd14.170017>.

⁵⁷ Available from: <https://northernmichiganchir.org>

Phase 2 - Explore the Problem and Find Opportunities for Leverage



Explore the upstream causes of the complex problem to develop a shared understanding of the system and to identify promising opportunities for targeted intervention.

Exploring community conditions through the ABLe Change Framework

A commitment to the CHIR State Innovation Model and the NMCHIR's mission signaled participants' recognition that addressing the community conditions that affect residents' health and health equity requires an intentional focus on the issue's upstream sources, the social determinants of health. The questions then became, how might these cross-sector partners work together, and where within the community system might they focus their efforts to achieve greater health and health equity?

To investigate these questions, in 2017 more than 90 NMCHIR partners joined an in-depth training in the ABLe Change Framework⁵⁸ developed by Drs. Pennie Foster-Fishman and Erin Watson of Michigan State University to help communities more effectively address complex social problems and achieve transformational change. The training took place during three separate two-day sessions over the course of six months. The training's purpose was to give participants the chance to learn the fundamental concepts of systems change; to explore new ways of working together; to explore health and health equity through the lens of the ABLe Change Framework; and to identify opportunities for targeted intervention that might shift the community system conditions that perpetuate health inequities and disparities.

To kick off the first two-day session, participants were first invited to assess their own work. "We

looked closely at our stakeholders and the impact of our work at different levels," recounts Llore. The session started with individual reflection where people organized their thoughts on colorful sticky notes. Next, people shared their reflections in small groups, and eventually everyone displayed their work on huge sticky walls for plenary review. The visual gave participants the chance to acknowledge the vast amount of work underway to improve health outcomes and the social determinants of health. With so many individuals advancing so much good work, they wondered why hadn't they already succeeded in eliminating barriers to health and health equity.

The question offered the facilitators an ideal segue to present fundamental concepts of systems change, including the defining characteristics of complex social problems and why they require cross-sector collaboration. "We learned that, despite our best intentions, we wouldn't move the needle unless we started working together in new ways," says Llore. Erin Barrett, the NMCHIR's regional community coordinator adds, "What's required is adopting different collaborative practices not just within our individual organizations, but at the systems level as well." Next, participants brainstormed the challenges they saw for cross-sector collaboration and for working more effectively at the systems level, including:

- Limited resources (both human and financial) for coordination
- Competition, turf wars, and "sector-specific" lenses that exacerbate siloing
- Tensions between individual, organizational, and community/systems-level needs
- Existing processes that don't give equal weight to all voices
- Difficulty in measuring the success of changemaking efforts

⁵⁸ *ABLe Change Process: Tools and Resources for Community Systems Change*, Michigan State University, http://systemexchange.org/application/files/4515/9111/1141/ABLe_Change_Process_for_Community_Systems_Change_Tools_and_Resources.pdf.

When participants reconvened for the second two-day session, the facilitation team organized discussion groups by sector. Some people joined groups aligned with their experience, while others joined out of curiosity to learn something new. Discussions supported the groups in exploring possible policy or environmental changes that could be made across sectors to improve different social determinants of health. "Together we brainstormed strategies with a priority on off-the-wall ideas. It was exciting to see all these new possibilities for our work," says Llore.

Finally, the training's third session focused on the cultural changes that would be necessary for NMCHIR partners to embrace shared leadership and collaborative action. The session raised questions, such as: What principles might be adopted for creating actionable meetings that foster accountability? How will partners value the different roles people inevitably play (like devil's advocate or disruptor) in collaborative settings? Valuing these roles differently, how might partners navigate challenging conversations with greater ease? And how might partners share successes and credit?

Opportunities for leverage

In addition to the ABLLe Change Framework, NMCHIR partners also gained exposure to collective impact⁵⁹ and the Six Conditions of Systems Change framework,⁶⁰ all three of which undergird their work today. Using these tools during the training, NMCHIR partners identified multiple opportunities for leverage at two levels of the community system: structural and relational.⁶¹

Structural change (policies, practices, resource flows) – Leverage opportunities included:

- Promoting equity through system policies and practices to create fair and just opportunities for health for all
- Co-creating strategies that target the root causes of top-ranked barriers to health confirmed through extensive primary research and the NMCHIR's MiThrive assessment, which is designed to gather input from residents, especially those enrolled in Medicaid

Relational change (relationships & connections, power dynamics) – Leverage opportunities included:

- Greater coordination and alignment among diverse, cross-sector partners, with a focus on building trusting relationships and organizing for action and shared learning
- Being more responsive to resident voice⁶² to close the gap between traditional decision-makers and those with first-hand experience of community problems

Through the ABLLe Change Framework training, NMCHIR partners learned that the community system is highly complex. Yet the NMCHIR is also, itself, a complex interconnected system of conditions and organizations with individual and shared priorities, structures, practices, and relationships. Given this, partners acknowledge that any collaborative action designed to target the leverage opportunities may result in negative unintended consequences. NMCHIR partners therefore share a commitment to continually consider how their own efforts might unintentionally contribute to the conditions that create the need for their work in the first place.

⁵⁹ Kania, John, and Mark Kramer. "Collective Impact." *Stanford Social Innovation Review*, 2011. https://ssir.org/articles/entry/collective_impact.

⁶⁰ Kania, John, et al. FSG, 2018, *The Water of Systems Change*, https://www.fsg.org/resource/water_of_systems_change.

⁶¹ Kania, John, et al. FSG, 2018, *The Water of Systems Change*, https://www.fsg.org/resource/water_of_systems_change.

⁶² The NMCHIR uses the term *resident voice* broadly to acknowledge all individuals who belong to the community system.

"We target leverage points through all of our work, no matter whether we're doing a MiThrive assessment, running a committee meeting, hosting a learning community session, or evaluating our work. Even when we're framing problem statements, we focus on the upstream sources of the issue, rather than its downstream symptoms or unintended consequences."

— Erin Barrett, *Regional Community Coordinator, Northern Michigan Community Health Innovation Region; Public Health Planning Coordinator, District Health Department #10*

"Applying a systemic lens represents a different way of working, and a different way of thinking. It's given us some great tools and greater awareness of our blind spots. We know our work affects the work of others. We really are all in this together, and there will always be enough work for all of us to do. We need to work together to maximize the limited resources available."

— Rose Fosdick, *Coordinator, Human Services Collaborative Body, Manistee County*

Phase 3 - Design and Carry Out a Constellation of Actions



Design and carry out a systems-change strategy sequencing the actions necessary for creating out-sized impacts throughout the whole system.

By 2019, the NMCHIR had successfully built a strong foundation from which to advance meaningful change. The NMPHA was providing backbone support to a broad base of cross-sector partners, many of whom were by then trained in systems change concepts. These partners had cohered around a shared mission and vision of healthy people in equitable communities, and they had identified leverage opportunities for targeted intervention within the community system. With additional funding support from Rotary Charities, the NMCHIR was poised for collaborative action.

A constellation of mutually-reinforcing actions

Among the NMCHIR's responsibilities is building a resilient network of cross-sector partners who support local residents, along with collaborative community health assessments and health improvement plans. Through these and other targeted interventions, the NMCHIR addresses all of the leverage opportunities identified through the ABL Change Framework training at once, working at the levels of both population health and individual health. Murray suggests that NMCHIR partners constantly share what they're learning across levels of the community system through their activities.

What follows is an overview in broad strokes of the NMCHIR's Community Connections and MiThrive Programs, along with a more in-depth description of the Northwest CHIR Learning Community, a new intervention as of 2021—just three of the actions the NMCHIR supports to shift the system conditions that perpetuate health inequities and disparities.

Building a network of health professionals through Community Connections:⁶³ "Community Connections addresses the individual health of people in our communities with a focus on the social determinants of health," describes Murray, who oversees its implementation across the 31-county service area. To develop the program, the NMCHIR convened a meeting in 2017 where partners explored how to better screen residents' needs and discuss how they wanted the community to respond. Participants co-created a process on a large sticky wall. "When I look back, we're pretty much doing what we originally said we would do," reflects Murray enthusiastically.

Community Connections is certified⁶³ by the Pathways Community HUB Institute. It provides a framework for both identifying under-resourced residents at risk of poor health and social outcomes, and connecting them to resources to improve their health and well-being. "We partner with 36 different patient-centered medical homes⁶⁴ to start asking

⁶³ Available from: <https://northernmichiganchir.org/community-connections>

⁶⁴ A *medical home* is a health care delivery model where a team, led by a health care provider, provides comprehensive and continuous medical care to patients with the goal of obtaining positive health outcomes.

their patients 10 questions about the basic needs of food, housing, mental health, physical health, utilities, transportation," says Murray. If a patient is interested in assistance, Community Connections will contact the individual within three to five days. From there, a trained community health worker engages the resident, develops a custom care plan based on identified needs, and connects the individual to resources for improved health outcomes.

On average, 250 referrals are made to Community Connections each month. These referrals have become a valuable source of data and learning for the NMCHIR.

"We want people to be healthy, but there are often a variety of reasons why people aren't healthy. The purpose of Community Connections is to surround people with the support they need to achieve the outcomes everyone wants."

— Jenifer Murray, HUB Director, Community Connections Northern Michigan Community Health Innovation Region; Grant Coordinator, Region 2 & 3 Perinatal Quality Collaborative

Conducting a collaborative MiThrive Community Health Assessment: Many organizations, from health departments to hospitals to nonprofit health care agencies to community-based organizations, are required to conduct health assessments for a variety of reasons, such as maintaining accreditation or meeting Internal Revenue Service requirements. More often than not, these groups conduct their assessments independently. In a departure from the status quo, the MiThrive Community Health Assessment builds connections between organizations to conduct a collaborative community health assessment every three years. The process involves collecting primary and secondary data to better understand what's happening from a population health perspective, involving residents in establishing priorities, and using the data to

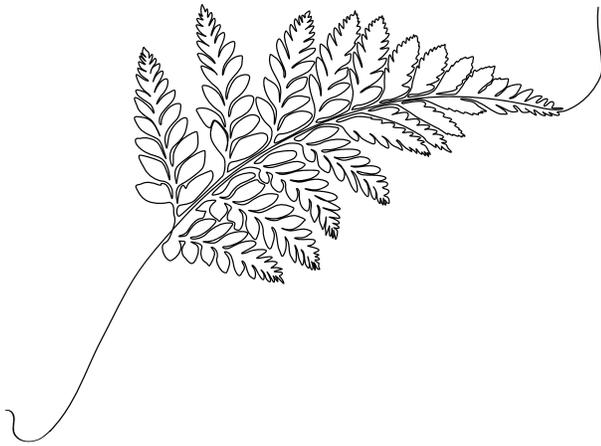
inform a regional community health improvement plan. "Through MiThrive, we leverage the perspective of hundreds of participating organizations and residents, pool our resources, and produce high-quality, open-source data that everyone can use, reducing duplication," says Barrett.

What's more, the intentionality NMCHIR partners bring to gathering information for the assessment represents one way they are being more responsive to resident voice. "In the past, residents were tapped so frequently for different assessments that they developed survey fatigue," says Llore. "For us, prioritizing residents and their experiences means changing how we work to meet their needs and ours." Take, for example, the assessment's demographic questions. Barrett convened community partners to reflect on their implicit biases and update the standard set of demographic questions for greater inclusivity. "Giving residents the chance to check more than one box for race and gender was a critical adjustment," she reflects. "It's been encouraging to see how small changes can have huge impacts for the people we're trying to engage."

With changes like this in place, the 2021-2023 MiThrive Cycle collected the perspective of 991 Northwest Michigan residents who prioritized the following areas for improvement in the belief that changes could be made to positively impact their overall health and well-being: access to safe affordable housing; access to quality behavioral health services; reducing chronic disease rates; and access to health care. Regional-level data from the assessment is available in MiThrive Data Briefs.⁶⁵

Launching the Northwest CHIR Learning Community: In 2019, many partners of the Northwest CHIR (NWCHIR), which is focused on 10 counties in the northwest region of the NMCHIR, were participating in place-based action teams focused on local system issues and opportunities. When the COVID-19 pandemic hit

⁶⁵Available from: <https://northernmichiganchir.org/mithrive>



The Northwest CHIR Learning Community: A fractal of the Northern Michigan CHIR

Systems change initiatives undertake a variety of mutually-reinforcing actions to advance transformative change. The opportunity of these actions is the chance to influence the system at a much larger scale than the scope of any individual action itself. Fractals, or patterns that repeat over and over at different scales, help us understand how this is possible, and the natural world offers examples of fractals everywhere. Fern leaves grow in a fractal pattern, and trees repeat their branching pattern from the trunk out to the newest branches. "Fractals teach us to start small, moving from the micro to the macro levels, creating patterns that get larger and larger as they grow," writes David Erlichman.⁶⁶

The Northwest CHIR Learning Community—a facilitated space for peer learning and collaboration—is a small-scale version, or a fractal, of the NMCHIR as a whole. As the story shows, the Learning Community not only evolved through similar phases of development as the NMCHIR, but also gives participants the chance to practice the collaboration and targeted interventions that the NMCHIR seeks to support at the largest scale for improving health and health equity.

in early 2020, the action teams became the perfect setting for troubleshooting issues brought on by the public health crisis. "Our focus became addressing critical needs. Getting masks and hand sanitizer into the hands of farm workers and that kind of thing," recalls Paula Martin, who is the community nutrition specialist at Groundwork Center for Resilient Communities. Llore adds, "COVID-19 seemed to create this unique time when people became open to changing almost everything about the way they worked. There was a sentiment that people just wanted to help their communities." The NWCHIR launched a variety of rapid responses through the action teams, yet after a year or so, Barrett noticed participants' energy shifting as urgent needs began to subside: "It didn't seem like there was as strong of a need for these spaces, so we posed the question, are the action teams still serving us?"

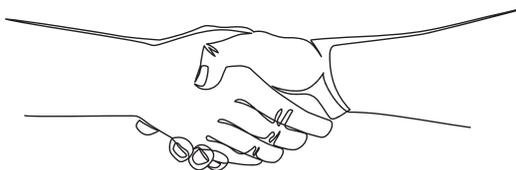
Coming together for a common purpose: Raising the question led to an organic evolution of the action teams into the Learning Community, a new space for partners focused on the 10 counties served by the NWCHIR. "The transformation of the action teams into the Learning Community speaks to our adaptability as a system. Partners are encouraged to speak up when a space no longer serves them, and we adapt our structures based on our partners' current needs," reflects Llore. Consolidating what people valued most about the action teams into a single space, the Learning Community became a safe, neutral setting for partners to come together for relationship-building, shared learning around topics of interest, and co-creation.

Barrett celebrates the "more organic, less structured" nature of the Learning Community, though she does provide overall leadership and facilitation at its bi-monthly meetings. Barrett's intention is to strengthen the group's collective capacity and foster a culture where all participants feel a sense of inclusion and belonging. Many partners who were previously engaged with the action teams have joined the Learning Community, in addition to others from

⁶⁶ Ehrlichman, David. *Impact Networks: Creating Connection, Sparking Collaboration, and Catalyzing Systemic Change*, Berrett-Koehler Publishers, 2021, p. 178.

different parts of the NWCHIR and even some people who are brand new to the NMCHIR as a whole. "Anyone can join the Learning Community, though participation is weighted toward people from the nonprofit health care and public health space," she describes. Roughly 70 people belong to the Learning Community's listserv and about 10 to 20 participate in bi-monthly meetings.

Setting up shared infrastructure: In terms of operating logistics, Barrett circulates agendas in advance for input. Meetings always begin with a question to bring everyone's voice into the virtual space, along with a level-set to orient participants new and old to the Learning Community and the topic at hand. Barrett frequently uses tools from the ABLe Change Framework and facilitation techniques from the global design company IDEO to stimulate systems thinking. The Learning Community uses a Google Drive Folder to organize resources as open-source artifacts of their work and a shared calendar to keep everyone in the know about upcoming events.



The Northwest CHIR Learning Community uses the following community agreements to create a safe, neutral setting for partners:

- *Come as you are, and contribute what you can*
- *Experiment, fail fast, and learn along the way*
- *Value contribution over attribution*

Establishing shared priorities: Along with establishing these practices and supports, one of Barrett's first priorities was to identify areas of focus for the Learning Community. Reflecting on the process for doing so, Martin recalls, "We assessed network needs and talked about what we wanted to learn and where we needed support." The priorities that rose to the top aligned strongly with the leverage opportunities identified for the

NMCHIR as a whole and included amplifying resident voice and power, promoting health equity, and strengthening cross-sector coordination and alignment.

"I appreciate the level of intention that the Learning Community brings to creating a shared understanding of the current landscape of our community—our common issues and priorities, as well as areas of shared interest and shared values. It gives us a foundation to explore how we can collectively contribute to our goals."

— Sarah Eichberger, Public Health Nutritionist, Michigan State University Extension

Taking action: Building on the practices the NMCHIR had already adopted around being more responsive to resident voice—including adapting demographic questions on the MiThrive assessment—in late 2021, the Learning Community began reflecting on the question, how might we *empower* residents to advance the vision of healthy people in equitable communities? A strong desire to shift power and resources directly into residents' hands led to the Community Empowerment Project, designed to award mini-grants of up to \$5,000 to community-based projects led by residents. Learning Community participants worked on criteria for the grants, developed an application, disseminated it, and reviewed applications. In total, five projects were awarded funding in the spring of 2022, one of which provided peer-to-peer support for first responders. "What I appreciated most about the project is that it was people-centered, as opposed to data-centered. I learned so much about what community members need and want," says Martin. "It was humbling," adds Llore. "We thought residents would need and want so much more support from us, but they said, 'No, we know what we're doing here.'" Awarding resources in this way represented a step forward for the NWCHIR in shifting power to residents and closing the gap between traditional decision-makers and those with first-hand experience with community problems.

In June 2022, Learning Community participants focused their attention on creating a shared understanding of health equity and on learning how to embed its principles not just within the Northwest CHIR's decision-making, data collection, storytelling, problem-solving, and evaluation practices, but also within the partner organizations' operations. Challenging to grasp, yet essential to the systems change the NMCHIR seeks to advance, health equity "cuts across all six conditions of systems change,"⁶⁷ says Barrett, "from our practices and policies all the way down to the mental models shaping decisions." Barrett organized opportunities for Learning Community participants to explore deeply entrenched obstacles to health equity—ranging from people's living conditions to social and institutional inequities—and to co-create strategies to overcome them. "We have conversations in the Learning Community that wouldn't happen anywhere else, like our recent conversations about health equity," says Sarah Eichberger, a public health nutritionist with Michigan State University Extension. "Some people think our region is homogenous, lacking different cultures and perspectives. Our conversations have helped create shared understanding around the level of diversity that does exist here and how to center it within our community health systems."

Spreading the learning: Acknowledging how learning spreads across the Northwest CHIR and beyond, Barrett says, "It's incredible to have a space for engaging in deep learning that participants can then cross-pollinate within their own organizations." Rose Fosdick, who serves as coordinator of the Human Services Collaborative Body for Manistee County, agrees: "We've collaborated on activities through the Learning Community, but for me, the real value has been taking information and resources back to my local community." Murray also emphasized the value she found in sharing the curated health equity resources with her Community Connections Work Group members, who later went on to share them with participating health and human service agencies across all 31 counties served by the NMCHIR. This is just one

way NMCHIR partners intentionally spread learning and good practices to shift the community system toward greater health equity.

Looking ahead: Not unlike many peer learning spaces inside systems change initiatives, looking ahead, the Learning Community faces the challenge of sustainability. Today everyone celebrates Barrett's leadership, yet Fosdick raises the question, "What happens when funding for the Learning Community dries up? If no one takes the lead like Erin has, peer learning opportunities become everybody and nobody's job at the same time, and it doesn't get done." Thankfully, with existing supports in place, partners will continue to benefit individually and collectively from the NWCHIR Learning Community's programming, and plans are now in the works to establish a second Learning Community for partners focused on the 10 counties served by the North Central CHIR.

"The Learning Community gave my agency the chance to develop stronger relationships with people working in other health and human services areas. Through these relationships, we've been able to improve the accuracy of the information we provide when people call the 211 line, and other agencies seem more likely to notify us of any changes in their programming."

— Sara Johnson, Resource Database Manager, Community Access Line of the Lakeshore

"There are so many groups doing so many wonderful things to address health inequities, but resources are scarce. When we're going after the same funding, it makes sense to build relationships and collaborate so we can get more done with less. One benefit of the NMCHIR is having a more transparent line of communication between everyone, especially around resource allocation. We want to be in the same boat rowing together versus competing with each other."

— Paula Martin, Community Nutrition Specialist, Groundwork Center for Resilient Communities

⁶⁷ Kania, John, et al. FSG, 2018. *The Water of Systems Change*. https://www.fsg.org/resource/water_of_systems_change.

Phase 4 - Learn and Adapt for Continuous Improvement



Foster a culture of learning to support ongoing adaptation and improvement, and adopt practices to regularly take stock of progress toward short- and long-term goals.

Fostering a culture of learning

Since its beginnings, the NMCHIR has prioritized building a culture of learning out of recognition that advancing meaningful systems change requires challenging the status quo. To be successful, what's needed is a culture where partners listen to understand, feel safe to respectfully challenge one another's ideas, innovate together, make course corrections as needed, and share accountability—all elements of collaborative learning. Murray

Shared Infrastructure

Applying the principles of collective impact,⁶⁸ the Northern Michigan Community Health Innovation Region (NMCHIR) established different forms of shared infrastructure to create stronger alignment across the initiative toward its shared goals.

Backbone support – The Northern Michigan Public Health Alliance provides invaluable backbone support, given the Alliance's skill and experience in designing and facilitating multi-stakeholder meetings and creating effective community health improvement plans focused on needs of populations made vulnerable, including Medicaid beneficiaries.

Shared resources – The NMCHIR has explored opportunities for collaborative financing. For example, Rotary Charities funded the exploration of a Pooled Community Wellness Fund. NMCHIR partners also share staffing, training opportunities, data, assets such as a community calendar, and knowledge and expertise, among other resources.

Participation – Participation in the NMCHIR is open to any resident or community partner who shares the NMCHIR's goals and seeks an opportunity for alignment, coordination, networking, shared learning, and/or expertise. The NMCHIR staff connects new participants to a formal hour-long orientation and the appropriate working group, committee, or learning

opportunity. Additional ad hoc orientation practices help the staff develop mutual relationships with new participants, strengthen the NMCHIR's culture, and remind everyone that they are free to come and go based on their needs, time, and energy.

Committees and work groups – To complement the backbone support, amplify resident voice, and facilitate information flow, the NMCHIR formed a variety of committees, working groups, and teams. These include action teams, the Clinical Community Linkages Work Group, the Community Health Assessment and Improvement Work Group, and a Steering Committee that reserves 51% of its seats for non-health care community representation. Residents, cross-sector community partners, and representatives from community power-building organizations or initiatives are all eligible to fill these seats.

Decision-making – The NMCHIR uses a consensus model for decision-making, intentionally gathering resident input.

These supports not only help the NMCHIR comply with the State Innovation Model requirements set by the MDHHS, but also provide just enough stability for the initiative to remain innovative and adaptable to shifting external contexts and the changing needs of residents and partners alike.

⁶⁸ Kania, John, and Mark Kramer. "Collective Impact." *Stanford Social Innovation Review*, 2011. https://ssir.org/articles/entry/collective_impact.

reflects that on a day-to-day basis this looks like "constant learning, constant connection, constant checking in."

One way the NMCHIR puts learning into practice is through action learning, an approach to problem solving included in the ABLe Change Framework. Action learning is a continuous cycle of defining problems, designing strategies for addressing them, implementing actions, and learning by assessing impact and responding quickly to feedback. The NMCHIR's commitment to action learning has facilitated more effective responses to new data and emerging issues within the community system.

NMCHIR partners have also participated in numerous training opportunities to cultivate a learning mindset and build their collective capacity for working toward shared goals. Llore, for example, participates in Rotary Charities' Systems Change Community of Practice, a facilitated space where practitioners engage in peer learning around common systems change challenges, such as measuring progress, communications and storytelling, and network health and well-being. Fosdick participated in Rotary Charities' Leadership Learning Lab, which exposed her to different leadership and communication styles and inspired her to help organize a three-day communications skills training for leaders in Manistee County in partnership with a nonprofit called Our Community Listens. Others participated in a two-day training hosted by Rotary Charities with author David Peter Stroh on lessons from his book *Systems Thinking for Social Change*,⁶⁹ as well as instruction in *Liberating Structures*,⁷⁰ easy-to-learn "micro structures" used to create more inclusive and engaging meetings.

"The concepts of systems thinking aren't new to me, but the trainings I've attended offered a shared language for communicating about them, which has made it easier to convey complex, challenging, and even sensitive ideas."

— Rose Fosdick, Coordinator, Human Services Collaborative Body, Manistee County

Ongoing evaluation

The NMCHIR embraces a quality improvement approach to evaluation that involves creating multiple feedback loops to gather input from diverse stakeholders on NMCHIR programs and adapting in response to feedback.

In the case of Community Connections, for example, HUB coordinators who oversee the clinical community linkages network meet monthly to discuss what's working well, what challenges have arisen, and any new policies and procedures in an effort to create consistency across their 31-county program. Murray describes a new evaluation tactic of "texting clients an evaluation link at the end of our services" to ask for input as a complement to existing practices. Maintaining these feedback loops through close connection with community health workers supports Murray and her colleagues to constantly keep on the lookout for improvement opportunities.

Similarly, Barrett describes how evaluating the NWCHIR Learning Community involves checking in regularly with participants and asking two questions: How are we collectively supporting the conditions that facilitate change? And how will we know change is occurring based on our collective actions? Barrett plans to experiment with Outcome Harvesting,⁷¹ a relatively new evaluation methodology for systems change that

⁶⁹ Stroh, David Peter. *Systems Thinking for Social Change: A Practical Guide to Solving Complex Problems, Avoiding Unintended Consequences, and Achieving Lasting Results*. Chelsea Green Publishing, 2015.

⁷⁰ Available from: <https://www.liberatingstructures.com>

⁷¹ Cabaj, Mark. Review of *Outcome Harvesting: Principles, Steps, and Evaluation Applications*, by Ricardo Wilson-Grau. <https://www.tamarackcommunity.ca/library/outcome-harvesting-principles-steps-evaluation-applications>.

involves collecting the outcomes (good and bad) from a diverse set of actors that add up to desired impacts. In the meantime, Barrett collects feedback from Learning Community participants to support quality improvement and ensure that the Learning Community's structure and priorities remain aligned with participants' capacity and interests.

The NMCHIR is also experimenting with ripple effect mapping,⁷² an evaluation technique to uncover the intended and unintended consequences of the collaborative work.

Signals of change

The NMCHIR's tagline reads "Aligning systems. Transforming lives," capturing the essence of its approach for working toward its vision of supporting healthy people in equitable communities. The question becomes, how is the NMCHIR progressing toward its vision? Drawing on its learning and evaluation practices, NMCHIR partners have identified patterns (or trends) that signal positive change as a result of their collective efforts.

NMCHIR partners demonstrate the ability to adapt their practices at different scales—from building connections between organizations to conduct a collaborative community health assessment at the macro level, to adopting new assessment questions at the micro level—to better meet the needs of the residents they serve. NMCHIR partners also fluidly reorganize their structures to support cross-sector collaboration, as in the case of the action teams. "Being open to shifting our structures if they no longer serve our collective feels like a powerful signal of change," reflects Llore. "I'm part of other groups that won't change because they think it would suggest that what they've been doing all along isn't great. We try to model adaptive behavior in everything we do in service of our overall goals."

In creating space for cross-sector relationship building, the NMCHIR strengthens the community system overall and its ability to respond to residents' needs. Sara Johnson, the resource database manager for the Community Access Line of the Lakeshore, shares, "My agency plays a connecting role between residents who have needs and all of the service providers who help them. Thanks to the NWCHIR Learning Community, the service providers feel like my colleagues in a way that they didn't before. Now it feels like I'm working with them as opposed to alongside them. Our work feels more integrated." Johnson's example is just one among many others from NMCHIR partners who celebrate their deepened connection to other health professionals across the region.

What's more, the NMCHIR is more responsive to resident voice not just through efforts like the Community Empowerment Project, but also through what Barrett calls "micro practices"—small practices that lead to outsized impacts throughout the community system. "We're changing how we do community health improvement planning," Llore offers as another example. "We ask ourselves, will our plans impact the community? Have we talked to anyone who has experienced the problem? How many people have we talked to? How many different groups? Before we jump to implement any solutions, we check ourselves with questions like this—and we don't move forward until we do that outreach."

Finally, thanks to the collective effort of NMCHIR partners, two profound mindset shifts seem to be underway. NMCHIR partners are placing significantly greater value on residents' perspectives. "We still look at evidence-based strategies, but we view anything we learn locally from people with lived experience as equal to, if not more important, than any other source of

⁷² Available from: <https://extension.umn.edu/community-development/ripple-effect-mapping>

information," offers Llore. Additionally, evidence collected by the Michigan State University's System ExChange in 2019, along with similar findings from the MDHHS in 2021, indicate that NMCHIR partners are spreading a new, more complex understanding of health and the social determinants of health throughout the community system, creating an opportunity to expand their base of support on their journey toward healthy people in equitable communities.

Taken together, all of these signals of change suggest that NMCHIR partners are strengthening the alignment among cross-sector partners and creating the conditions not only for improved health outcomes, but also for more fair and just opportunities for residents to attain their highest level of health.

share a vision of the future where everyone feels a sense of belonging, inclusion, and connectedness with their community. Where everyone feels seen and supported. And where everyone has access to resources that meet their unique needs. Together, NMCHIR partners are working toward a future of healthy people in equitable communities—a vision that will impact generations to come.

For more information on this story, please contact Emily Llore at E.Llore@nwhealth.org.

Looking Ahead

Addressing a complex community challenge is a feat no single organization can achieve on its own. Instead, it requires the coordination and alignment of diverse stakeholders to amplify what enables the desired change and stop what inhibits it. Given the inherent complexity of challenges like advancing health and health equity, what can be especially difficult for multi-stakeholder groups like the NMCHIR is the truth that, as Barrett puts it, "We won't ever fully know the extent of our own individual role in creating change."

Even so, the NMCHIR has successfully garnered the commitment of over 160 cross-sector partner organizations, and even more individual participants, in creating a new reality for residents in Northern Lower Michigan. NMCHIR partners

Insights From Systems Change in Action

Five key insights emerged across the four case studies featured in *Stories of Change* that point to the practices that have accelerated changemakers' progress in transforming the systems at the heart of complex community issues. These insights are for anyone—regardless of organizational context or stage in changemaking—working to *change the odds* in favor of communities where everyone can thrive.

Systems change through trusting relationships and clear roles

With a priority on bringing diverse stakeholders together to harness their collective perspective, ingenuity, and power, the four case studies show the critical importance of creating trusting spaces where changemakers from throughout a system can regularly convene. These spaces support people in creating authentic connections and building relationships, often with unlikely partners, at both the individual and organizational levels. They allow people to feel safe to learn together about the system at the heart of their work. They also empower people to self-reflect, challenge each other's assumptions, and communicate openly. Typically supported by a set of ground rules, or agreements, and strong facilitation, trusting spaces enable people to strengthen the relational foundation of their collaborative work and open up new possibilities for the future they seek to create.

People leverage these spaces to clarify their individual and organizational roles within collective systems change work, as in the example of the Healthy Food Access Partnership story. The three groups initially struggled to build consensus around a long-term vision and to put their work in motion due to competing priorities and limited experience with collaborative decision-making. With external facilitation support, changemakers began practicing transparent communication and crafted a formal partnership agreement that clarified

their roles, distributed power and responsibility, established methods for accountability, and supported their realignment around the shared goal of increasing access to healthy food and nutrition education for individuals experiencing food insecurity. The process of creating the partnership agreement, and the agreement itself, created a strong foundation for collaborative action that ultimately transformed the relationships among the three groups. This enabled the partners to move nimbly during a time of crisis and amplified their collective power to increase access to healthy foods for those who need it most.

"Relationships are at the heart of this work. It's about connecting and establishing trust—and then testing it."

— Meghan McDermott, Deputy Director, Groundwork Center for Resilient Communities

"We've learned that the relational skill you bring to this work is fundamental. If you overlook relationship building and jump straight into action, the work will collapse of its own weight."

— Becky Ewing, former Executive Director, Rotary Charities of Traverse City

Systems change when we see them as completely as possible

Given the complex nature of problems like youth/young adult homelessness, food insecurity, and barriers to health and health equity, it's impossible for one individual or organization to have a broad enough view to address them on their own. The four case studies show that, to change systems, we need to see them *as completely as possible*. This means we need to collect multiple diverse perspectives and listen for the ways our own perspectives might be incomplete or wrong. "Systems change is really about being open to

other people's understanding of the world," reflects Jan Delatorre, a program officer with the Michigan Health Endowment Fund and co-funder of the Healthy Food Access Partnership. "Being open to the idea that my view is not 'the' view. It's just one view. An understanding of the issue at hand can be made more rich by listening to other people and putting collective ideas in motion."

The four case studies also suggest that when we engage multiple perspectives, it becomes easier to identify and challenge our assumptions and implicit biases and better understand our own role in systems. "This is deep work," says Emily Llore, the Northern Michigan Community Health Innovation Region's director of community health assessment and improvement planning. "You will have to change your own mindset and your actions. You will need to support others in doing the same." We, as individuals, are all part of systems, and when we change, systems begin to shift. When many of us change simultaneously in alignment with a shared purpose, we can affect transformative change.

When Rotary Charities set out in 2014 to discover what it would take to enable more enduring community-level change, for example, the staff thought that the exploratory process they had set in motion was simply the beginning of a strategic shift. But the more they learned about supporting transformative change processes, the more they realized that *they themselves* were in the midst of such a process. Thanks to their trusting relationships, the Rotary Charities board and staff began to consider, with consultant support, how they may have been unintentionally inhibiting more enduring impact on complex community issues. Together they identified problematic patterns within their strategies and approach and committed to making internal shifts to enable more transformative change. To overcome some fear of risk, failure, and experimentation, for example, they committed to staying open to failure (their own and others) as a path to valuable learning. The team now practices this intention, among many others, identified in partnership with changemakers to

better support their grantee partners in addressing the upstream sources of the region's most intractable problems.

"Today, we are much more likely to appreciate our grantee partners' learning experience. In the past, we were so tied to goals. Now, if a partner finds that their strategy didn't work, we want to know what they've learned. In the past, we awarded value only to results. We now know it's much more powerful to award that value to learning."

— Marlene Bevan, Board Member, Rotary Charities of Traverse City

Systems change when we make equitable power shifts

Creating more equitable systems and, consequently, communities where everyone can thrive requires centering the voices of people with lived experience of complex community problems and shifting power into their hands. Rotary Charities and the three initiatives are learning that this means involving those most affected by the consequences of community problems in processes for both decision-making and accountability, such as evaluation and learning. "This work can't just come from organizational staff working in their offices to identify and solve problems in their community," asserts Sarah Eichberger, a public health nutritionist with Michigan State University Extension. "You have to make sure you take the time to ground truth *everything* with people who have the experience of the issue you're focused on."

Through its collaborative work to end youth/young adult homelessness, for example, the Northwest Michigan Coalition to End Homelessness (NWCEH) empowers youth/young adults to be equal partners at the table, so to speak, and to contribute their perspectives on everything from creating goals to evaluating Youth Homelessness Demonstration Project activities. Every decision made by the NWCEH requires the involvement and final approval of the Youth Action Board, which is

made up of youth/young adults at risk of and/or currently experiencing housing instability, to ensure that services for youth/young adults are developed with their guidance. NWCEH members also sign a charter in agreement that "lived experience is expertise" signaling their commitment to dismantling inequitable power structures that stifle the voices of youth/young adults.

"We will always be committed to hearing from the people who experience the system and hold that above everything else."

— Ashley Halladay-Schmandt, *Director, Northwest Michigan Coalition to End Homelessness*

"Set clear expectations for people with lived experience. They are usually juggling a lot, and clear communication will support their consistent participation."

— David Van Horn, *former Youth Action Board Chair, Northwest Michigan Coalition to End Homelessness*

Systems change when learning becomes strategy

All four case studies reveal a mindset shift among stakeholders from regarding learning as a result of evaluating strategy to regarding learning as *an essential strategy in and of itself*. In a systems change approach, learning to learn together (and constantly) is critical. "Learning is an integral part of every phase of systems change work—getting to know partners and clarifying roles, gathering multiple perspectives and creating a shared understanding about the terrain, and learning about the effects of strategies and when to change course," says Freya Bradford, Rotary Charities' director of systems change and learning. Learning is a key leverage opportunity for adaptation and innovation at the individual, organizational, and system levels in the work of addressing any complex challenge.

Implementing learning as a strategy requires shared infrastructure, processes, and mindsets. Within the Northern Michigan Community Health Innovation Region (NMCHIR), for example, the Northwest CHIR Learning Community is a space for partners across 10 counties to come together for relationship building, shared learning, and co-creation. Meetings are held bi-monthly on topic areas aligned with the NMCHIR's overall priorities. In June 2022, Learning Community participants focused on creating a shared understanding of health equity and learning how to embed its principles across their shared and individual work. "It's incredible to have a space for engaging in deep learning that participants can then cross-pollinate," says Erin Barrett, the NMCHIR's regional community coordinator who also facilitates the Learning Community. Participants took the equity learning back to their local communities and to other work groups within the NMCHIR. Curated resources were eventually shared with health and human service agencies across 31 counties. In this way, NMCHIR partners intentionally spread learning and good practices throughout the community system to shift the conditions that perpetuate health inequities and disparities.

"What you learn may not be what you expected to learn, but that doesn't devalue it in any way. In fact, it moves us along further in tackling large issues. Learning to learn together is of huge value to our grantee partners and to us."

— Marlene Bevan, *Board Member, Rotary Charities of Traverse City*

Systems change—bring patience

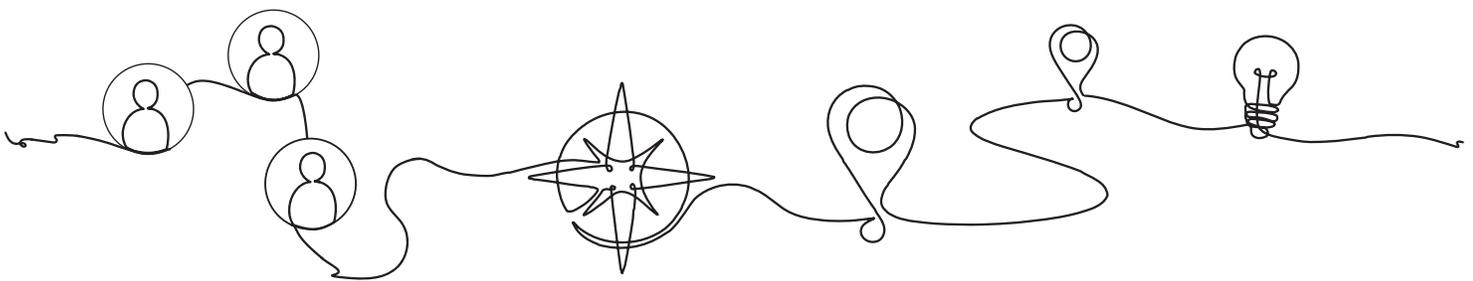
The long game of transforming a complex system can be a challenging reality. It takes time for a diverse group of stakeholders to come together in alignment around a shared purpose, let alone to begin working together differently and working on different things to address root causes. The

processes common to a systems change approach demand patience in a context that traditionally expects linear progress and measurable outcomes within relatively short periods. Yet funders and changemakers alike in the stories featured here seem to embody this mindset shift. “Be patient,” advises Rose Fosdick, who serves as coordinator of the Human Services Collaborative Body for Manistee County. “You have to go through the process together to get everyone to buy in and lay a foundation for lasting change.” Jeff Hickman, a Rotary Charities’ board member, agrees: “Be patient with the process. Don’t expect immediate results.”

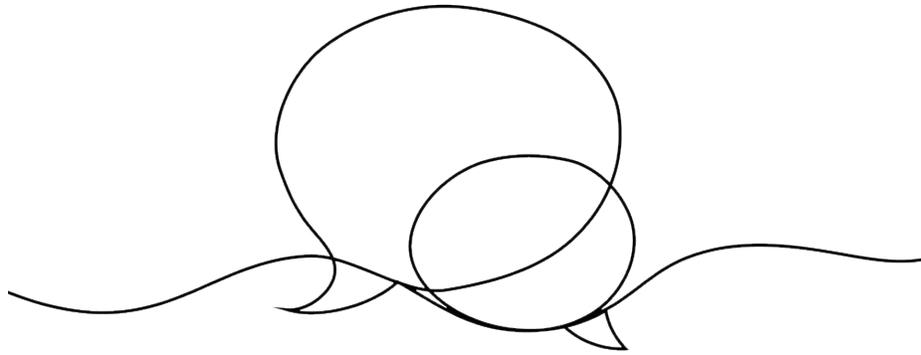
Eichberger adds, “These issues can’t be addressed quickly, but it’s important to acknowledge the more incremental wins, like building momentum or a successful community event.” Often, the earliest signs of a shifting system are changes in how people across the system work together, who they listen to, and how they understand the problem. “The intermediate outcomes of systems change work look different from what we’re used to celebrating as changemakers and funders,”

acknowledges Bradford, “and we need to have the patience and insight to call those wins.”

The three systems change initiatives featured in *Stories of Change* are on the path to solving complex community problems. Thanks to their collective efforts, the systems they seek to transform are showing positive signs of change, including reductions in the frequency of youth homelessness, sharp increases in the accessibility of healthy food through the emergency food system, and fewer barriers to health and health equity. These shifts, among others, are the result of changemakers’ perseverance in creating the conditions for change at the individual, organizational, and systems levels—and they are contributing to a more fair and thriving Northwest Lower Michigan. “We are thrilled about the success that has come as a result of this new shared approach, and we’re leaning in, patiently, for the long game,” says Sakura Takano, Rotary Charities’ CEO. “There’s not an endpoint with systems change. It’s a way of working that we believe will allow our region to continue adapting to what lies ahead.”



Discussion Guides



Do you want to use Stories of Change to reflect on your own practice? Whether you're new to systems change or an experienced practitioner, these stories can provide new perspectives and inspiration. To help turn new insight into action, we developed reflection and discussion guides that accompany the text. Each guide targets a different audience:

- Those new to systems change but curious about its potential,
- Experienced systems change practitioners, and
- Funders.

The guides can be used for individual reflection or, ideally, individual reflection that is then processed with a group of stakeholders committed to moving from insight to new action.

A Reflection & Discussion Guide for the Systems Change Curious

This reflection and discussion guide accompanies the publication *Stories of Change: How a Systems Change Approach is Transforming a Region*, written by Jessica Conrad with Rotary Charities of Traverse City. This version has been designed for anyone who is curious about systems change. It is meant to be valuable both as an individual reflection tool and/or as a guide for group discussion.

Intro & Using a Systems Change Approach (pp. 1 - 12)

- What social or ecological problem(s) are you focused on? Would you describe any of them as complex (p. 5)? If so, what makes them complex?
- Stories of Change presents the work of systems change in four phases (pp. 10-11). How is this approach similar to and different from the way you are approaching the problem?

Case Studies (pp. 13 – 67)

- The four case studies share the story of changemakers transforming the systems at the heart of complex community issues. Reflecting on the stories, what strengths among the people in the stories stand out most to you, and why?
 - Which of these strengths do you and/or your team already have? Which ones might you want to build?
- The four case studies share the story of changemakers transforming the systems at the heart of complex community issues by *working together differently* and *working on different things* (pp. 19 – 20). What ways of *working together differently* spotlighted in these stories might you like to try more of in your work? What's one action you can take right away?
- Systems change work generally aims to change the policies, practices, resource flows, relationships, power dynamics, and/or mental models that are holding a problem in place. Do you feel like you have an adequate picture of how these factors relate to your problem area? If not, how might you go about getting a more complete picture?

Insights from Systems Change in Action (pp. 68 - 71)

- The following five insights emerged across the four case studies, pointing to the practices that can accelerate changemakers' progress in advancing systems change:
 - Systems change through trusting relationships and clear roles.
 - Systems change when we see them as completely as possible.
 - Systems change when we make equitable power shifts.
 - Systems change when learning becomes strategy.
 - Systems change—bring patience. Which insight(s) stands out most to you, and why? Which one(s) challenges your understanding of how change happens? Why might that be? What lesson(s) from these insights might you be able to apply right away?

Did this guide spark any new insights or action? Do you have a question to add or other feedback? We'd love to hear from you! We're eager to connect with and learn from others who are engaged in, or interested in, systems change strategies. Please reach out to Freya Bradford, Rotary Charities Director of Systems Change & Learning: fbradford@rotarycharities.org, or on LinkedIn

A Reflection & Discussion Guide for Collaborative Systems Change Practitioners

This reflection and discussion guide accompanies the publication *Stories of Change: How a Systems Change Approach is Transforming a Region*, written by Jessica Conrad with Rotary Charities of Traverse City. This version has been designed for practitioners who are actively involved in a collaborative systems change initiative. It is meant to be valuable both as an individual reflection tool and/or as a guide for group discussion.

Intro & Using a Systems Change Approach (pp. 1 – 12)

- What social or ecological problem(s) does your initiative address? Would you describe that problem as *complex* (p. 5)? If so, what makes it complex?
- Stories of Change defines a systems change approach, in part, as one that primarily addresses the causes rather than the consequences of complex problems. Would you say the work of your initiative primarily addresses the consequences or causes of the problem? In what ways?
 - What is standing in the way of a greater focus on the problem's *causes*?
- Stories of Change presents the work of systems change in four phases (pp. 9-11). How do these phases align with your initiative's approach? Where do they differ?

Rotary Charities of Traverse City: From Charity to Changemaker (pp. 13 – 24)

- This story shows the importance of learning in community to bring about transformational change. Where within your initiative are you learning alongside your partners and/or funders? Where might there be an opportunity for greater shared learning among all stakeholders?
- Within your initiative, what would it mean for you and your partners to *work together differently* (pp. 19-20)? What barriers to a different way of working exist? How might you overcome them?
- Stories of Change surfaces the insight that the principles and work of shifting complex community problems also applies to us as individuals and organizations (p. 16). How might you be both advancing and/or inhibiting change within the system at stake?
 - How might your funding or funders be both advancing and/or inhibiting your initiative's ability to advance change?

A Story of Change: Ending Youth Homelessness in Northwest Michigan (pp. 25 – 36)

- The problem of youth homelessness is challenging to quantify. Why do you think it's important to create accurate baselines, even when they are so hard to establish for complex problems?
 - Does your initiative have an adequate understanding of the current state of your problem? (e.g., Who or what experiences it? Who or what experiences it most severely? (p. 10)) How has this baseline been helpful?
 - If not, what additional information do you need? What might be a next step in collecting it?

- This initiative benefitted from several smaller grants that helped them build capacity and eventually leverage additional larger grants for the work. What additional capacity might increase your initiative's ability to advance the work?
- Tina Allen reflects, "For us, there is a significant difference between the homeless response system and the 'systems work' we were embarking on" (p. 29). How does your initiative draw a boundary around your system?
 - How might expanding or contracting this boundary impact the work?
- This story shows that centering the voices of people with lived experience in a change effort is about more than careful listening. What stands out to you about the way in which NWCEH uplifted the voices of youth/young adults with lived experience and shifted power into their hands?

A Story of Change: Securing Healthy Food Access in Northwest Michigan (pp. 37 – 52)

- Early on, the Healthy Food Access Partnership developed a systems map using tools offered through Acumen Academy's free Systems Practice course. More recently, the Partnership began experimenting with Ripple Effects Mapping, a nontraditional participatory evaluation tool. To what extent does your initiative experiment with different tools to support systems thinking? Where might there be an opportunity (or need) for greater experimentation?
- A lack of clear roles and responsibilities within the Healthy Food Access Partnership quickly became a barrier to collaboration. Where are roles and responsibilities clear within your initiative? Where might there be a need for improvement?
- The Healthy Food Access Partnership advanced their change effort by swiftly responding to a dramatic change in context brought about by the COVID-19 pandemic. What mindsets and capacities do you think enabled their response, ongoing adaptation, and deepening partnership over time?
 - What lesson might this example hold for your initiative?

A Story of Change: Improving Health and Health Equity in Northern Michigan (pp. 53 – 67)

- The CHIR's tagline reads "Aligning systems. Transforming lives." If you created a tagline for your initiative, what might it be?
 - There seems to be an inherent tension, or polarity, in systems change work between the reality of its complexity and the need to communicate it simply.

Which side of this tension does your initiative currently favor? How might you better balance this tension in your work?

- During an in-depth systems change training, CHIR partners learned that how they work together across the system is just as important as what they work on (pp. 57 - 58). What barriers to cross-sector collaboration do you see within your initiative? What changes might be needed to overcome them?
- The Northwest CHIR Learning Community uses community agreements to create a safe, neutral setting for partners (p. 62). Does your initiative follow any explicit or implicit community agreements or norms? How do you hold each other accountable?

- Could any of the barriers to cross-sector collaboration you highlighted above be addressed by creating a new community agreement?
- The CHIR has organized itself differently for different functions or purposes. They found their place-based action team format was an ideal structure when COVID-19 hit. It allowed them to quickly troubleshoot new issues and support each other. When needs shifted more recently, so did their structure (pp. 60 - 61). How is your current structure “fit to purpose?” How is it not?
 - What might need to shift in order for your initiative to be more nimble or fit to purpose? (e.g., Policies, practices, resource flows, relationships, power dynamics, mental models)

Insights from Systems Change in Action (pp. 68 - 71)

- **Systems change through trusting relationships and clear roles.** When have you been a part of a trusting space? What value did that space bring to you? Is there anything that could have been different about it that would’ve increased its value?
 - What did/do you contribute to that space? Is there something more you might offer?
- **Systems change when we see them as completely as possible.** How do you currently gather multiple diverse perspectives to inform your initiative’s goals, strategy, and collaborative action? What different practices might you like to begin experimenting with?
- **Systems change when we make equitable power shifts.** Has your initiative made a commitment to equity? How are you acting on it? What shifts within the system, if any, are you noticing as a result? What else might you do to embed equity more deeply into your collaborative work?
- **Systems change when learning becomes strategy.** How is “learning as strategy” different from how you have viewed learning in the past? What benefits might this framing have?
- **Systems change—bring patience.** How are you tending to your wellbeing during the long game of systems change?

Now that you’ve come to the end of the discussion guide, we invite you to review your reflections. What is one question or idea that is completely within your power that you want to commit to move from insight to action?

Did this guide spark any new insights or action? Do you have a question to add or other feedback? We’d love to hear from you! We’re eager to connect with and learn from others who are engaged in, or interested in, systems change strategies. Please reach out to Freya Bradford, Rotary Charities Director of Systems Change & Learning: fbradfrod@rotarycharities.org, or on LinkedIn.

A Reflection & Discussion Guide for Funders

This reflection and discussion guide accompanies the publication *Stories of Change: How a Systems Change Approach is Transforming a Region*, written by Jessica Conrad with Rotary Charities of Traverse City. It has been designed for funders who are either actively supporting upstream work on complex community problems or who are interested in getting more upstream. The guide can be used as a prompt for individual reflection and/or a guide for group discussion among staff, board, and partners.

Intro & Using a Systems Change Approach (pp. 1 – 12)

- What social or ecological problem(s) does your organization's grantmaking address? Would you describe these problems as complex (p. 5)? If so, what makes them complex?
- Stories of Change presents the work of Systems Change in four phases (pp. 10-11). What other processes for systems change have you seen or experienced?

Rotary Charities of Traverse City: From Charity to Changemaker (pp. 13 – 24)

- Overall, what role does your organization currently play in improving systems? What role do you want to play? How might you begin closing the gap? What might you need to let go of in order to close the gap?
- In the context of your funding practice, what would it mean for you to *work together differently* with changemakers? What barriers to a different way of working exist? How might you overcome them?
- Stories of Change surfaces the insight that the principles and work of shifting complex community problems also applies to us as individuals and funding organizations (p. 16).
 - How might you deepen your reflection and learning around the ways you and your team might be both advancing and inhibiting change?

Three Case Studies (pp. 25 - 67)

- Each story follows four phases of systems change (described generally on pp. 10-11). Do you currently provide any funding or support for work like that described in any of the phases? If yes, what? In which phase do you think your involvement is having the greatest impact/leverage? Why?
 - If you're not currently providing funding or support for work in any of the phases, which one would be most aligned with your current goals? Why? Which phase would be least aligned? Why?
- Each story also highlights examples of funders supporting multi-stakeholder initiatives in a variety of ways. What support do you currently offer beyond grants and investments? How might you begin experimenting with providing more forms of support beyond financial resources?
- The stories end with a section called "Signals of Change" that highlights the shifts each initiative noticed in the systems at stake. What stands out to you about these shifts? How might they differ from the outcomes you typically hear about in grant reports?

Insights from Systems Change in Action (pp. 68 - 71)

- **Systems change through trusting relationships and clear roles.** When have you been a part of a trusting space? What value did that space bring to you? What value do these spaces bring to your grantee partners?
- **Systems change when we see them as completely as possible.** How do you currently gather multiple diverse perspectives to inform your own practices?
 - How do you support your grantees in doing the same?
 - What different practices might you like to begin experimenting with?
- **Systems change when we make equitable power shifts.** What support do you currently offer your grantee partners for adopting more equitable practices? What else might you do?
- **Systems change when learning becomes strategy.** How is “learning as strategy” different from how you have viewed learning in the past? What benefits might this framing have?
- **Systems change—bring patience.** Take a moment to reflect on your current mindset about the timeline for creating enduring change. How long do you think it takes (or should take) to make progress on complex social and ecological issues? How long do you typically invest? What types of intermediate results might make you more comfortable with longer grantee relationships?

Did this guide spark any new insights or action? Do you have a question to add or other feedback? We'd love to hear from you! We're eager to connect with and learn from other funders who are engaged in, or interested in, systems change strategies. Please reach out to Freya Bradford, Rotary Charities Director of Systems Change & Learning: fbradfrod@rotarycharities.org, or on LinkedIn.

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Glossary

Changemaker: Anyone, at any age, experience, or ability, who has the tenacity and courage to tackle a social issue or opportunity with a creative approach. Changemakers leverage the strengths of collaboration, existing resources, and the insights of those closest to the issues to work differently to create community assets and systems that allow all to thrive.

Community assets: Anything that improves the quality of life in the region: physical infrastructure, such as affordable housing, transportation, clean energy, and water; arts and culture; as well as increased access to recreation, healthy food, education, healthcare, and other service-based solutions to address basic community needs.

Complex problems: Problems defined by adaptive, interconnected, emergent, and non-linear qualities, which bring important implications for decision-making and strategy.

Guiding principles: The lens that Rotary Charities uses to inform everything from how the organization selects grant applications for funding to the development of new learning opportunities to its own evaluation. The organization's six guiding principles include: inclusive, collaborative, resourceful, reflective, adaptive, and aligned.

Initiatives: Multi-stakeholder systems change initiatives.

Leverage opportunities: Places where targeted intervention can produce out-sized impacts throughout a system.

Mental models: Habits of thought—deeply held beliefs and assumptions and taken-for-granted ways of operating that influence how we think, what we do, and how we talk.¹

Policies: Government, institutional and organizational rules, regulations, and priorities that guide the entity's own and others' actions.²

Power dynamics: The distribution of decision-making power, authority, and both formal and informal influence among individuals and organizations.³

Practices: Espoused activities of institutions, coalitions, networks, and other entities targeted to improving social and environmental progress. Also, within the entity, the procedures, guidelines, or informal shared habits that comprise their work.⁴

Relationships and connections: Quality of connections and communication occurring among actors in the system, especially among those with differing histories and viewpoints.⁵

Resource flows: How money, people, knowledge, information, and other assets such as infrastructure are allocated and distributed.⁶

Rotary Charities' region: A five-county area including Antrim, Benzie, Grand Traverse, Kalkaska, and Leelanau Counties.

System: A set of related components that work together in a particular environment to perform whatever functions are required to achieve the system's objective.⁷

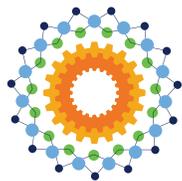
Systemic: Relating to a system, especially as opposed to a particular part.

Systems change approach: An approach that supports stakeholders in addressing the causes, rather than the consequences, of a complex social or environmental issue by taking a holistic, or systemic, view and transforming the policies, practices, resource flows, relationships and connections, power dynamics, and mental models that underlie it.⁸ This approach requires deep collaboration between those working on all areas of an issue and those who have experienced its consequences firsthand to affect positive change.

^{1 2 3 4 5 6} Kania, John, et al. FSG, 2018, *The Water of Systems Change*, https://www.fsg.org/resource/water_of_systems_change.

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Resources for change.