

INNOVATION LAB GRANT PROGRAM

February 2021 Evaluation Report

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TABLE OF CONTENTS

- [SUMMARY](#)
- [BACKGROUND](#)
- [THE IMPACT OF INNOVATION LAB GRANT PROGRAM](#)
 1. [Collaboration Impact](#)
 2. [Financial Sustainability Impact](#)
 3. [Customer Engagement Impact](#)
 4. [Internal Organization and Leadership Impact](#)
 5. [Data Use and Sharing Impact](#)
 6. [Equity and Diversity Impact](#)
 7. [Trust-based Philanthropy Impact](#)
- [SYSTEMS CHANGE CHALLENGES IN THE COVID ERA](#)
- [TOP PRIORITIES IN 2021](#)
- [FEEDBACK AND SUGGESTIONS FROM GRANTEEES](#)
- [FUTURE RESEARCH DIRECTIONS](#)
- [CONCLUSION](#)

SUMMARY

Since 2016, HealthSpark Foundation (HSF) has focused its philanthropic efforts on “systems change,” or changing the fundamental ways the social safety net functions to achieve more lasting and sustainable outcomes. These include addressing policies and practices of the social safety net, building networks and coalitions, and addressing stigma and public perception. HealthSpark is also committed to implementing trust-based philanthropy. The Foundation believes relationships and projects are stronger when they are built on mutual trust and partnership; and that the wisdom of its grantee partners and the experiences of consumers receiving assistance will help all of us to strengthen the safety net system. Both systems change work and trust-based philanthropy are distinct from traditional philanthropic models and considered ‘newer’ models of philanthropy. Many questions still exist about their effectiveness and impact.

During the planning sessions in 2017, the community helped HSF design a new grantmaking model to support nonprofit partners in carrying out systems change projects. This grant program is called the Innovation Lab (IL). Through IL, nonprofits and partners receive funding to develop or test out a potential system change idea. The first IL grants were awarded in 2018, and a second round was

awarded in 2019 after changes were made to the design of the program. Subsequently, a third round was also on its way in 2020 but got suspended in favor of making direct grants related to COVID response. It eventually went through later on as the year came to its end.

In January 2021, a series of interviews was conducted with eight individuals representing organizations that participated in Round I and II of the IL grant program. The purpose was to learn about the impact the IL had on participating organizations and to gather ideas about how HealthSpark might improve its processes in the future. This report summarizes the findings from the interviews as well as recommendations for the Foundation.

BACKGROUND

1. Systems Change Philanthropy

Since the establishment of Carnegie and Rockefeller Foundations in the early 1910s, foundations have fought hard to address entrenched social problems, such as food insecurity, homelessness, illnesses, poverty, and lack of access to healthcare and education in underserved communities.

For most of the 20th century, grantmaking processes were mostly based on the traditional model of philanthropy, which involved grants responding to existing needs. By the end of the century, however, astute grant makers began to question their ability to make change. They started to explore ways to address root causes of social issues, facilitate long-lasting social changes and level the fields for everyone instead of responding to the “symptoms” and providing remediation.

However, all these complex issues are intertwined with one another, and each grant-receiving organization is a part of a larger web of organizations, government entities, private entities, and communities. All of which are also intertwined with each other and make up complex systems that ultimately impact social outcomes. For these outcomes to change, grant makers have learned that they must be engaged in changing these systems. In fact, the [National Committee for Responsive Philanthropy](#) reported the best foundations that have the highest impact are those that commit at least 25% of their gifts to systems change strategies, such as advocacy, community building and civic engagement.

So, what is systems change? [Systems change](#) focuses on changing the fundamental ways the social safety net functions to achieve more lasting and sustainable outcomes. Three common elements of systems change include:

- Addressing policies, procedures, practices, and cultures across all entities that are part of the system.
- Elevating voices and participation from those served by the system.
- Using a systems change lens to drive philanthropic mission at individual foundations

2. Trust-Based Philanthropy

Philanthropy is in itself a product of unequal wealth distribution and has (probably unintentionally) contributed to perpetuating systemic inequities, both in the ways wealth is accumulated and in the ways its dissemination is controlled. These inequalities are deeply rooted in racism, patriarchy, and other forms of oppression. Philanthropic foundations need to reckon with their own power the imbalances they create with the very people they strive to serve.

Trust-based philanthropy is a new philanthropic model intended to address the inherent power imbalances between foundations and nonprofits. At its core, trust-based philanthropy is about redistributing power systemically, organizationally, and interpersonally. In practice, this includes multi-year unrestricted funding, streamlined application and reporting, and a commitment to building relationships based on transparency, dialogue, and mutual learning. A commitment to trust-based philanthropy is a commitment to reinventing the structures, organizations, cultures, and norms, within which many grantmakers operate.

3. HealthSpark Foundation and the Innovation Lab Grant Program

HealthSpark Foundation is a private, independent foundation serving Montgomery County, Pennsylvania. Since 2016, HealthSpark Foundation (HSF) has focused its philanthropic efforts on “systems change.” HealthSpark is also committed to implementing trust-based philanthropy. The Foundation believes relationships and projects are stronger when they are built on mutual trust and partnership; and that the wisdom of its grantee partners and the experiences of consumers receiving assistance will help all of us to strengthen the safety net system.

During the planning sessions in 2017, the community helped HSF design a new grantmaking model to support nonprofit partners in carrying out systems change projects. This grant program is called the Innovation Lab (IL). Through IL, nonprofits and partners receive funding to develop or test out a potential systems change idea. The first IL grants were awarded in 2018, and a second round was awarded in 2019 after changes were made to the design of the program. Subsequently, a third round was also on its way in 2020 but got suspended in favor of making direct grants related to COVID response. It eventually went through later on as the year came to its end.

During January 2021, a series of interviews was conducted with eight individuals representing organizations that participated in Round I and II of the IL grant program. The purpose was to learn about the impact IL had on participating organizations and to gather ideas about how HealthSpark might have improved its processes in the future. The interviews were conducted on Zoom, and were not recorded to provide participants with the psychological safety they needed to fully express themselves. Participants were also assured anonymity and confidentiality. The interviews were transcribed in real time by a neutral consultant; identifiable information was removed during transcription and again right after the interviews. The transcripts were then coded and analyzed with NVivo. This report summarizes the findings from the interviews as well as recommendations for the Foundation.

INNOVATION LAB GRANT SYSTEMS CHANGE IMPACT

1. Collaboration Impact

- **Fostering trust and strengthening relationships between organizations in the safety net system**

Most of the interviewed grantee partners acknowledged fostering trust and strengthening partnerships as some of the greatest benefits of the Innovation Lab. The projects funded by the grant program have given them “a familiarity and frequency of communication that resulted in amazing and tangible impacts.” The partnerships established or strengthened during the grant program enable partner organizations to not only support each other during the pandemic, but also experiment new ways of doing the work.

“One of the greatest benefits of the Innovation Lab grants is the strengthening of relationships. It is the strengthening of relationships that let us do out of the box thinking. We trust the people that we are working with that we are committed to the shared goal.”

- **Leveraging partnerships to combine services and share resources**

A direct impact of collaboration is expanding organizations’ client base and their capacity to combine services with partners. One grantee said, thanks to the Innovation Lab, they were able to partner with other organizations to provide complementary services and follow-up care as well as determining the next steps for the people they serve. Another grantee shared how the coordination and sharing of resources, including equipment, helped them respond to pop-up opportunities and manage the influx of new funding. Another expressed excitement and optimism about a pilot project to streamline resources and its potential long-term impact on both organizations:

“We’re looking at sharing information, databases, coordination of services for shared clients. We are hoping to take the project to HealthSpark for an implementation grant.”

- **Establishing new connections that would not happen otherwise in the safety net**

The Innovation Lab also created a financial incentive for grantee organizations to step out of their “comfort networks” and reach out to new people, who are still a part of the safety net system. This is critical for systems change as IL grantees organizations are encouraged to break down the silo mentality, and to find new voices and creative ways to diversify their membership. Without a source of funding directly intended to fulfill this purpose, this paradigm shift would not happen.

“When we first launched the idea, pre-COVID, we talked it up and sent out an invite. We were proud of the response. Everyone wanted to come and hear about it. We had county people from different offices, colleges in the area who wanted to learn about the opportunity, and other nonprofit providers – behavioral, drug and alcohol – so it was the perfect opportunity to bring in other partners.”

2. Financial Sustainability Impact

Most grantees acknowledged the main purpose of their Innovation Lab project was not to gain long-term financial sustainability for their organizations but to test new ideas and pilot systems change policy. They nevertheless saw the potential impact on the financial sustainability of their organizations through strengthening partnerships, sharing costs, and attracting future funders.

- **Cost saving through collaborations and shared resources**

Innovation Lab projects allow grantee organizations to establish partnerships and test new business models. This can help strengthen their long-term financial sustainability, especially through sharing costs and resources.

“Sharing staff across organizations would be a cost saver through bulk buying, for example with health insurance – we’re looking to see if as a collaborative we can form an umbrella organization to purchase health insurance.”

- **Bringing organizations to better positions to attract future funders**

Innovation Lab allows grantee partners to launch proof-of-concept projects and test their ideas with no string attached. For small organizations without a long history of track record, or even well-established ones that want to pilot new concepts, this is a unique opportunity for them to experiment and collect valuable data for future large-scale projects. The lessons learned and data collected from the pilot will give them an edge in future grant applications and increase buy-in from future partners and funders.

“[The Innovation Lab project] gave us a chance to launch ourselves out there. For us, you show up with a PowerPoint presentation with your dream on it, and certain funders aren’t ready to jump-in. We became more appealing to other funders to launch this grant and to be able to show data and a reputation as a good provider behind us. This project was our dream, and we can show that it’s sustainable. It gave us clout to show up to larger institutional partners to launch it.”

3. Customer Engagement Impact

Some of Innovation Lab projects are pilot programs centering on building community leadership and engaging people with lived experience. The project focuses on making sure the people they serve are heard and the services they provide are truly meeting the needs of people. The following points summarize the impact and lessons learned from these projects.

- **Increasing outreach in the underserved communities**

Community outreach is an important mission of many organizations in the safety net system. The Innovation Lab funding allows many grantees to explore innovative outreach strategies and focus on their outreach efforts in communities which have been traditionally underserved. These include minority communities, immigrant communities and non-English speaking communities.

“We are reaching out to communities and people that we haven’t reached before. Everything coming from HealthSpark is about that, and it’s helping us shift.

“We have built a lot of trust with new communities, including immigrant communities and Latinos and non-English speaking clients. Prior to this, we weren’t reaching enough of the community that was likely in need of services, based on comparing our client data with population data. Now, non-English speaking clients are a majority of our clientele so that was a breakthrough.”

- **Building a more cohesive system which creates referral ease for both customers and providers**

Collaborations established through the Innovation Lab have contributed to creating a more cohesive safety net system and easing the process of referral for both providers and clients. The grantee below expressed how the relationships established through IL have helped their organization to better serve their clients:

“Another benefit was the ease of referrals in crisis situations. For example, last month we had someone come to us speaking in broken English, telling us about a sexual assault on her daughter. She didn’t know who to turn to but because of the relationships we had developed with other organizations, I knew exactly where to connect her – literally picked up the phone and had a phone conference call together. It’s one story that shows a tangible outcome of relationship-building and familiarity that allows us to do things immediately.”

- **Giving grantees opportunities to learn and be more self-aware of challenges and gaps in their customer engagement efforts**

As previously mentioned, the Innovation Lab gives grantees an opportunity to experiment innovative ways of engaging customers and people with lived experience through pilot projects. They can test their ideas in practice to see which ones work and which ones do not work for their clients and situations. Both successes and failures are valuable lessons for grantee partners to learn and be more self-aware of the gaps in their customer engagement system and the effectiveness and feasibility of their strategies.

“We have a long way to go. Our cultural responsiveness is limited – our forms remain in one language, we all speak only English... Our project is focused on consumer engagement to find strategies to be more equitable. There is a lot of support and focus on including people with lived experience, and yet it’s a struggle. The model has been to bring people together and ask them what we should do, and it fails. We’ve tried to pay them to engage, and that fails. What we find is that anonymous surveys, in an application process for services, work better. We’ve learned that we need people with expertise out in the community and doing work where people are.”

4. Internal Organization and Leadership Impact

- **Training leaders and staff on the concept and practice of systems change**

Innovation Lab enables grantees to engage their staff and executive leaders in the conversation about systems change, and the practices that need to be put in place to move the needle forward. The funding also helps increase buy-in among staff. This is important because systems change concepts in practice are still new for many people.

“I always think when you put finances into a project, and you’re clear about the hours and what you are putting into a grant, it is easier to get buy-in. When you talk about concrete funding, it helps others to engage. Without HealthSpark Foundation, we would not have done the project.”

- **Encouraging taking risks and testing systems change concepts in reality**

Almost all Innovation Lab projects are innovative in nature, which requires experimentation and risk-taking. The grants empower staff and leaders to step out of their comfort zone, connect with other organizations, test new strategies and take risks. This spirit itself brings a new sense of hope and excitement for organizations in the safety net system, most of whom are committed to serving humanity and leveling justice.

“Inside our organization, before this grant, systems change was a concept that was being talked about only a little bit. After the grant, there was a glimmer of hope that we could solve this big problem. We got more buy-in and excitement – we had talked about this challenge and frustrations, and this was an opportunity to do something.”

“We regret none of the risks we’ve taken because we either achieved good results or we learned something.”

5. Data Use Impact

One of the IL projects focused on creating a share database across partners. The project is still underway, and they are trying to find the base-level data that all organizations need to collect and share it uniformly. Many grantees acknowledged the difficulty of sharing data due to inconsistency of the ways data were collected across partners and privacy policy.

6. Equity and Diversity Impact

Innovation Lab grant and HealthSpark Foundation in general were acknowledged by grantees to be a leading engine to push forward the conversation about equity and diversity. For many grantees, this is a hard yet needed conversation to have:

“HealthSpark deserves props for taking on the equity work.”

“Throughout all of the work with HealthSpark, it’s been clearly communicated, through this grant or the communities of practice, everything coming from HealthSpark is about equity and justice, and we are taking beginning steps to make sure equity and justice are part of everything we do. We are reaching out to communities and people that we haven’t reached before. Everything coming from HealthSpark is about that, and it’s helping us shift.”

“That’s not an easy thing to do, to navigate hard conversations, including around diversity and inclusion and everything that happened in the last year. Discussions of race can be scary, I am afraid of them, and they are making it happen. Everyone is getting into that space, and that’s amazing that they started those hard conversations. Some of the questions in the RFP were challenging, and they made us think. It was scary in a good way.”

7. Trust-Based Philanthropy Impact

- **Attracting a network of grantee partners with similar missions**

HealthSpark’s Innovation Lab has been a hub for grantee partners committed to creating innovative ways to facilitate systems change. They believe in long-term partnerships built upon trust and mutual interests:

“That’s one of the greatest values that HealthSpark affords. I’m just now appreciating it after being involved for a couple of years. It takes a long time to build these relationships. It’s through crossing paths with organizations where HealthSpark

convenes service providers, and I see people again and again. This year, for example, we needed to find organizations that could expand services, and because of building relationships with people, I knew who to call and who could make it happen. I didn't have to build any kind of relationship with her because it was already established just through the paths crossing, and now that experience we had will be a springboard for other work together. They might not have anticipated it, but it's been a big impact – it's increased awareness and connections between organizations. It gets us to know organizations that are outside our own sector and silo, and yet are serving the same people we are serving with different services."

- **Causing returning grantees and long-term partners**

Most of the grantees interviewed have done a few projects with HealthSpark, either as a lead organization or as a partner organization. All returning partners said HealthSpark lived up to its commitment to trust-based philanthropy. They emphasized the value long-term relationships with HS brought to their organizations and expressed their commitment to deliver the expected outcomes.

"I work in different systems, food and housing, and the foundation has been a leader in helping organizations work well together and has clearly helped our organization. Our relationship with HealthSpark has definitely helped our organization become better known across the county than we otherwise would."

"They always have such nice things to say about us, and we want to deliver for them. We want to show them that we thoughtfully requested this money, and the fact that they trust us to do the work is everything. In that partnership, you have to take steps to take care of each other."

"As for trust-based philanthropy, they definitely do this. They've been such a strong partner for so long. It's really important because they can be threatening to some people. They are trying to shake things up and make things better."

SYSTEMS CHANGE CHALLENGES AND OPPORTUNITIES IN THE COVID ERA

1. Status quo maintenance and change resistance

Innovation Lab is about change, and change can make people uncomfortable. During the interviews, change resistance came up as one of the biggest barriers, identified by grantee partners throughout their experience implementing their projects. Resistance to change can come in many different forms and with both external partners and internal leaders and staff.

"What the Foundation is doing is a challenge to the status quo. It's inherent that some won't like that. Change is anxiety-provoking, uncomfortable, it holds people accountable, and not everyone can tolerate it. There are people who are not ready to have these conversations, they just want to do their jobs as they've known it."

"Resistance to change is the biggest challenge. Ultimately, we need systems leaders who will be able to make hard decisions and changes. Without that, it can only go so far."

“People started to realize the change in the system would impact their jobs, there was some resistance. We were hoping they would see it as partnership, but some saw it as adversarial.”

2. Social distancing

Most Innovation Lab projects center on building collaboration and partnerships. Building strong relationships requires great communication. COVID 19 and social distancing have forever altered the way organizations communicate with each other and posed unprecedented challenges especially in forming new partnerships.

“It’s easier to develop relationships when you are face to face. Some of the partners are new and starting to develop relationships with people virtually is challenging. A few weeks into COVID, we decided to continue with virtual meetings, not sure how long it would go, and it was messy at first with different platforms for presentations, and people weren’t used to virtual formats yet... Online, you don’t know if they are agreeing or listening, and it was challenging to gauge their interest and commitment.”

Strategies used by grantees that have proven to be effective in overcoming these challenges include actively reaching out to people and calling on colleagues to get introductions to new networks, being intentional about collaborations, creating an empowering context for people to get involved, convening small, relatable groups with all stakeholders at the table, and willing to have straight conversations if needed.

3. Management of limited time and resources

The pandemic has created an unprecedented need for safety net services and put many grantees under time pressure and competing priorities. There is also a need to invest into the technological infrastructure to make sure staff can work from home. Innovation Lab projects require time and commitment to step out of the regular circle of operation, which can be challenging for many organizations at this time.

“Managing the collaboration now is more difficult since everyone is busier with pressing needs during COVID. It can be a challenge to find the time to connect and strategize. There is a commitment to making it happen, and that’s probably the most important element in a collaboration – the commitment to it.”

“It’s always time-consuming to do something outside of your regular circle of operations. Every time you step out of the usual, you are committing your time and what you commit to it.”

4. Customer Engagement Challenges

Most grantees face a variety of challenges in customer engagement, especially during COVID. These include challenges posed by the impact of social distancing and a lack of in-person contact, the needs to operate some programs outside in extreme heat and cold, the increased costs for materials that were not needed before for outreach, issues with communication technology especially with

people living in deep poverty, and finally socio economic challenges in engaging people with lived experiences. More research needs to be done to tackle these challenges.

“This is the \$64,000 question, and one we’ve always struggled with. We want to find ways to authentically engage people with lived experience, so they don’t feel like a token, so they are not there for decoration. It’s not a good way to authentically engage someone and learn from them by putting them on a governing body – they are with people who might speak differently and discuss unknown concepts to them.”

Strategies used by grantees that have been proven to be effective are building an empowering context for everyone to be involved, convening smaller groups, accommodating participants with transportation support and time reimbursement if possible, having people with expertise out in the community, and adapting community outreach activities in a virtual world.

“One of the services we provided pre-Covid was a friendly visitor program for homebound people. Now we are asking volunteers to call our participants to check-in, and we ask them to let us know if there are concerns, health or otherwise, with our participants. We rely on our volunteers to engage with our participants. We are also developing training for volunteers to allow them to do basic mental health assessments, physical disabilities, and other needs so they can understand it better and we can provide better services.”

5. Underfunding, lack of resources and funding fluctuations during the pandemic

Funding fluctuations have been a constant source of concern for many grantees during the pandemic. One grantee shared they recently lost half of their staff due to massive funding fluctuations. Others shared their challenges being at the mercy of governmental funding and other sources:

“For small organizations, it is particularly tough. Larger organizations have fundraising staff and infrastructure to raise money and to scale programs. Community-based and grassroots organizations don’t have that strength or the resources to get resourced during a pandemic. The whole network of service providers became responsible for serving thousands and thousands of extra people. Within a couple of weeks of the March 2020 shutdown, so many people were facing hardship and needed help for the first time.”

Some organizations shared because of the pandemic, they received a big increase in funding as the needs for their services dramatically increased. However, the challenge was that they did not have the infrastructure and staff to deliver the services and ensure equity.

“We’ve gotten an influx of money from so many sources with layers of rules and regulations, and we’re trying to use it effectively and equitably. Our budget more than doubled. It is money on a scale that we have not seen since the financial crisis of 2009. There is a lot of money coming in to respond to the crisis, but it takes a lot of work to quickly build-up the infrastructure to deliver the services that are needed and suddenly funded, and with an eye on equity.”

6. Staff burn-out, lack of technology and mental health issue

Working from home poses many challenges not only to work efficiency but also to everyone's mental health. Some grantees acknowledged burn-out as one of the biggest concerns with their staff and said it was a challenge to be supportive of their staff and made sure they were taking care of their mental health.

Organizations have been very creative in finding ways to adapt to the new ways of working and supporting staff in this challenging time. Some strategies the grantees interviewed employed to tackle this issue include trying to stay away from too many Zoom meetings to give people more space, implementing "floating days" for staff to take off one day a month, hiring supportive staff if possible and conducting group exercises to bring everyone back to their purposes, why they do what they do.

GRANTEES' TOP PRIORITIES IN 2021

1. Funding and financial management

Finances for the organizations and the people they serve are one of the biggest concerns grantees have for 2021. COVID has hit the community hard. Although there has been a massive influx of resources into the safety net system due to governmental funding and donations, grantees are concerned that this source of funding may evaporate in 2021.

"I have a lot of concern about an ending of the massive amount of free food and money that have come into the system. I am concerned about what happens when it goes away, when donors who stepped up go away – a lot of concern about existing resources disappearing within a year. We've had to pivot the entire operation around constraints and maximizing resources that we have. The remaining fact of funding concerns that individual donations evaporate as fatigue happens or people forget they need help."

2. Safety and COVID vaccines

Ensuring everyone is safe is a top priority for grantees in 2021. Safety net organizations work with vulnerable people throughout the community, but many of them who are out in the community are not in the top tier of people getting the vaccine. One grantee expressed concerns for their staff's well-being and said until we could get the vaccines out, our community would not be safe. Moreover, educating staff and the community on COVID vaccines as well as creating a vaccination plan for the organization can be challenging.

"Even now, getting our head around the vaccine. Educating everyone, all of our employees that we serve, how to make good decisions. Our management team is involved in conversations about, will we make employees get vaccines. There are a ton of things that come up that are related to trauma. Those difficult decisions around a vaccine are number one. We were trained to do rapid tests, and we need to bring that to our employees and make sure people have access to testing. Navigating and walking alongside people we serve. We need to keep our eye on the most vulnerable."

3. Handling of uncertainty

The pandemic has put to test organizations' capacity to adapt to abrupt changes and deal with uncertainty. Many were put under crisis mode and worked at full capacity to serve people in situations they had never experienced before.

"So much uncertainty in 2021. We are flooded in eviction crisis calls, and we're not prepared for it. We are seeing an exponential increase in evictions. I have a concern about all of our capacities to serve them. Hopefully, the reinstatement of the eviction moratorium will get through."

"I am concerned about where we will be with people being homeless. We are concerned about how people will be able to maintain houses, and we are nervous about evictions becoming a much larger problem. It will transfer from housing to food security so we are focused on how people will survive economically in the next 6-12 months."

4. Team rebuilding

Many grantees in 2021 have been focusing on building back their staff team. They have embraced many innovative solutions to deal with the lack of staff, such as sharing administrative hours with other partners and finding ways to be more efficient.

"We're still understaffed and still taking a lot on. It's the workload right now. There are so many opportunities because of the influx of funding and support, and this realization that the government can fund these things if they choose to do so and prioritize it. It feels like a revolutionary time for those things that are good and that are scary. The biggest challenge is to show and demonstrate that we can be effective in our solutions, our embracing of equity work, and the challenge is fighting for the long-term for funding and personnel to keep this going."

5. Advocacy

Advocacy for the organizations and the bigger safety net system is another priority. The pandemic highlights the importance of advocacy work in shedding lights on to the gaps in the system and attracting funding from different sources. It is important to keep the momentum with advocacy and establish funding for issues that matter the most for people at this time.

"We have a lot of advocacy work ahead of us. The conversations about moving into advocacy and equity work have been good frames, and we intend to jump on the advocacy train."

6. Strategic planning

One organization emphasized strategic planning as the biggest opportunity for them in 2021. They are exploring how to build on their work and find new ways of doing the work.

"With the strategic plan, we'll come out of it looking at adding new programs, expanding the area we serve. COVID has shown the necessity of our services and our mode and we need to make sure that people are not isolated and have access to services."

FEEDBACK AND WISHES FROM GRANTEES

1. Hold Grantees accountable to deliver what they promise

To make sure the Innovation Lab grant program can fulfill its vision and fullest potential, grantees emphasized the importance of holding grantees and partners accountable for what they promised to deliver in their grant applications and ensured systems change and equity was at the heart of any funded project. Holding each other accountable will strengthen the integrity of the grant program and the mutual trust and respect between partners.

“As much as HealthSpark can hold every grantee to make sure every project has equity outcomes... We need to hold each funded project accountable through the deliverables and the reports. If HealthSpark really wants to invest in equity, make sure every project has an equity focus, they talk about it, center it, and report on it.”

2. Communicate explicitly the foundation’s intentions and expected outcomes

Most grantees acknowledged HSF did a great job in establishing trust-based philanthropy and communicating their commitment to building trust and long-lasting partnerships. However, the foundation’s vision and expected outcomes from a funded project may not always align with the grantees’ vision and ability to deliver. It is important for both sides to have frequent conversations and arrive at a mutual understanding about the project and the expected outcomes. As systems change can be a novel concept for many organizations, it is important for the foundation to communicate explicitly the intentions behind their grants.

“I will acknowledge that there are times when the foundation has ideas of collaboration that they want to foster more than us, and that’s not always clear... Sometimes I think they might have a hidden agenda about what they want to advance instead of the idea that they have. Sometimes I just want them to tell me what they wants to see, and they aren’t as interested in hearing my idea. I don’t always have time for the back-and-forth.”

3. Acknowledge the challenges of systems change in practice and the changes of HSF’s focus over the years

As mentioned earlier in the report, grantees have identified many challenges in implementing systems change concepts in reality and emphasize that changes can be anxiety-provoking and even threatening for many organizations. Grantees suggest the foundation to acknowledge these challenges as well as their changes of focus over the years.

“Over the years, they have changed their strategies and focus, and sometimes it is hard to know what they are looking for.”

“As for trust-based philanthropy, they definitely do this. They’ve been such a strong partner for so long. It’s really important because they can be threatening to some people. They are trying to shake things up and make things better. Maybe they could acknowledge that in their communications.”

3. Continue to attract and convene people and organizations committed to facilitating systems changes.

All the grantees that have been to HS's Learning Collaborative sessions have a great experience and learn a great deal from it. They said the sessions were well facilitated and had a great design. They hope the Foundation continues to offer these opportunities to grantees.

"HealthSpark is a highly effective convener. They know that just by creating spaces, networks are happening, strategies are being developed, and they trust us to take advantage of the spaces to make it happen."

Grantees also consider these events as opportunities for them to get to know new people and foster partnerships and create new projects with like-minded organizations, which go beyond the Innovation Lab.

"In one of the meetings, I started to talk with someone and we wound up partnering and sharing space to provide new services in our area. Those opportunities lend opportunities for us to connect with people that I might know we have things in common."

Finally, grantees suggest the Foundation use their convening power and ability to bring different stakeholders in the safety net system on the same table to discuss their needs and systems change strategies. The foundation can take on this opportunity or provide small grants to other leaders to facilitate the conversations.

"If you get people sitting around a table talking about their needs, people will open up more than doing a broad survey. Having a focus group of needy individuals could give us the opportunity to see unmet needs that we may be blind to. It would help us as organizations and also as a community. Being able to know, see, and understand the poverty that is often hidden is an important step."

"Continue to provide small grants so leaders can come together and learn from each other. This provides an opportunity for all to be heard – to bring in voices that represent the disability community, other under-represented voices and communities, under-resourced organizations that otherwise might be able to participate."

4. Be the continuous source of funding to initiate systems change and see through the fruition of the project

At the core, HSF is one of the main grantmakers in Montco that gives away grants for systems change. Grantees hope the foundation can continue to be the source of funding for systems change projects. As it takes a long time to see the fruition of any systems change project, grantees hope HS can continue to be their trusting partner in not only funding the testing of the ideas but also the implementation and fruition of the projects.

"Funding is always the big one. Making sure the funding is there to continue the work... Being the source to push organizations toward other models of operating would be a great help and a needed step."

"So long as they continue to provide funding and access to information, and opportunities for us to convene, that's a good recipe for success."

FUTURE RESEARCH SUGGESTIONS

1. Research on new models of data sharing

A system that enables safe, secure and effective data sharing between organizations will go a long way to facilitate collaborations and create a more cohesive evidence-based safety net system. Regardless, many grantees acknowledged the difficulty of sharing data due to inconsistency of the ways data were collected across partners. According to the findings from the interviews, most grantees rely on national and local data to do their work, some collect their own data from customers, but few shared data during their Innovation Lab projects.

Data sharing is an important component of any systems change strategies, findings from the interviews have revealed a gap that needs to be addressed. More research should be done to study the challenges and opportunities of data sharing in facilitating systems change. More funding should also be directed into building infrastructures and testing innovative data strategies.

2. Research on customer engagement strategies

A purpose of trust-based philanthropy is shifting the power dynamics between grantmakers and non-profits and making sure the communities' voices are included in the entire process. However, as previously mentioned, most grantees face a variety of challenges in customer engagement, especially during COVID. The pandemic has forever altered the way we do business and communicate with each other. More research needs to be done to identify strategies and best practices in customer engagement in the safety net system especially in this challenging time.

3. Research on the Montco safety net's attitudes towards systems change

As previously mentioned, resistance to change came up as one of the biggest barriers identified by grantee partners. To implement changes on systemic levels, we need people from all levels to be on board. Therefore, it is important to conduct research into the roots of this resistance and understand people's experience, hope, and fear. HSF can also open authentic and transformative conversations with different stakeholders in the safety net about this issue and answer any concerns that may come up.

CONCLUSION

Despite having been around for only a few years, the Innovation Lab Grant Program has shown great potential in fostering collaborations and pushing forward systems change practices in Montgomery County. The program's impact on the bigger safety net's systemic outcome is to be seen in the near future. HealthSpark Foundation also is on the right track in implementing trust-based philanthropy and deserves acknowledgement for their work in this area.